

**NAVIGATING MANAGEMENT AND PEDAGOGICAL
COMPLEXITIES IN BILINGUAL EDUCATION:
AN ESTONIAN CASE STUDY**

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ABSTRACT

This thesis on management and pedagogy in bilingual education details the development of Estonia's early and late Estonian-language immersion programmes in a context where a need for increased social cohesion underpinned programming, political will was mobilised and leadership was distributed among stakeholders. Genesee (2003: 17) considers the Estonian early immersion programme as one of the most carefully planned of its kind.

The research study documents management and pedagogical practices, including the ideational forces and concrete mechanisms that have contributed to the development of sustainable programming. Beardsmore (2007) calls for additional studies that simultaneously investigate pedagogy and management in bilingual education. The study incorporates action research, as the researcher investigated the development of a programme he had helped to co-manage and acted as an informant for the study. The personal account is grounded in an analysis of programme planning and reporting documents and of data from interviews with government decision-makers, and in a case study of four schools offering late immersion. Students, parents, deputy headteachers and headteachers were surveyed. Fifty-one lessons were observed.

This case study of language immersion, with its successes and setbacks, is also grounded in a literature review that explores the concepts of bilingualism, bilingual education, stakeholding, distributed leadership, professional learning communities and pseudo-communities. The review also examines the economic and cognitive benefits of bilingualism. The study is further informed by moderate social constructivism, and complexity theory. Bilingual education is thus situated in a larger ecology of structural interdependencies. It is argued that knowledge about these concepts, and their interdependencies can potentially be used to build contexts favourable for bilingual education.

A large number of assumptions, beliefs and pedagogical practices, as well as forces, mechanisms and counterweights were found to influence immersion programme development. Individual teacher assumptions, beliefs and practices tended to fall on a continuum between fostering or it is argued undermining student learning. All three were identified as having considerable impact on learning environments. In particular, the study revealed challenges faced by teachers in integrating content and language.

Planning mechanisms such as results-based management frameworks were crucial in programme development. However, these mechanisms were in and of themselves inert, being powered by forces such as stakeholder inclusion, a belief in immersion, and stakeholder learning. Whilst an Immersion Centre that led and coordinated programming was a central component in programme development, this mechanism was fuelled by the moral authority of its staff, their sense of mission, and dialogue for partnership. Maintaining balance through counterweights such as accountability for process with accountability for results also contributed to programme success.

The thesis proposes a redefinition of the terms CLIL (content and language integrated learning) and bilingual education. The thesis also argues that stakeholders such as educators and managers need to develop complexity competence which includes a high degree of competence in a wide range of fields and heightened meta-cognitive, meta-affective and meta-social skills. Two frameworks are offered for identifying and navigating key elements of the complexities of bilingual education – one is primarily pedagogically focused (A Continuum for Bilingual Education) and the other is primarily management focused (A Reciprocal Co-evolutionary Paradigm for the Development of Bilingual Education).

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ABBREVIATIONS

BERA	British Education Research Association
BICS	basic interpersonal communication skills
CAD	Canadian dollar
CALP	cognitive academic language proficiency
CILT	The National Centre for Languages
CLIL	content and language integrated learning
CPF	Canadian Parents for French
DL	distributed leadership
EAIP	Estonian Association of Immersion Parents
EC	European Commission
EME	Estonian Ministry of Education
EMER	Estonian Ministry of Education and Research (successor organisation to EME)
EU	European Union
EUR	euro
GCSE	General Certificate of Secondary Education
GPA	grade point average
Immersion Centre	Estonian Language Immersion Centre
Integration Foundation	Non-Estonians Integration Foundation & its successor organisation the Integration and Migration Foundation
IRF	initiation-response-feedback (pattern)
KGB	Committee for State Security (Komitet Gosudarstvennoi Bezopasnosti)
LEP	limited English proficiency

L1	first language
L2	second language
MS	Microsoft
NATO	North Atlantic Treaty Organization
NGO	non-governmental organisation
OECD	The Organisation for Economic Co-operation and Development
OSCE	Organisation for Security and Cooperation in Europe
PEN	Postsecondary Education Network (worldwide association of writers)
PfP	Partnership for Peace
PISA	Programme for International Student Assessment
PLC	professional learning community
RBM	results-based management
school managers	headteacher and deputy headteacher
SES	socio-economic status
SME	small and medium-sized enterprise
SPSS	Statistical Package for the Social Sciences
TC	teacher-centred
TDSB	Toronto District School Board
UNDP	United Nations Development Programme
UNESCO	United Nations Educational, Scientific and Cultural Organization
United States	United States of America
UK	United Kingdom
USD	American dollar
WWII	World War II
ZPD	zone of proximal development

DECLARATION

PART ONE

I have published or had accepted for publication parts of my thesis as follows:

Chapter Five: Economic and Cognitive Benefits of Bilingualism

Mehisto, P., Marsh, D. (2010) Approaching the Financial, Cognitive and Health Benefits of Bilingualism: Fuel for CLIL. In Y. Ruiz de Zarobe, J. Manuel Sierra and F. Gallardo del Puerto (eds) *Content and Foreign Language Integrated Learning: Contributions To Multilingualism In European Contexts*. Frankfurt am Main: Peter Lang.

I wrote the article, but benefited from some feedback from David Marsh and the editors, which I used to hone the article. David Marsh was recognised as an author because we had collaborated on a literature review to determine if a link had been found between creativity and bilingualism (cf. Marsh, D., Beardsmore, H.B., de Bot, K., Mehisto, P., Wolff, D. (2009) *Study on the Contribution of Multilingualism to Creativity Compendium Part One Multilingualism and Creativity: Towards an Evidence-base*. Brussels: European Commission). Many of the jointly researched references are used in the chapter, and I benefited from co-authoring the research report with David Marsh, and the remaining authors.

Chapter Eight: Features of Successful Immersion Programmes

Mehisto, P. (2010) The Authenticity Advantage. In G. Messina, E. Mineni (eds) *Educazione linguistica e approccio per competenze: norma, uso, apprendimento: Atti del seminario nazionale Catania 2009*. Catania: LEND.

I benefited from some feedback from Giovanni Messina, which I used to hone the article.

Mehisto, P. (2011) Complexity Competence: A tool for Co-constructing CLIL Programming. In D. Elsner, A. Wildemann (eds) *Sprachen lernen - Sprachen lehren. Perspektiven für die Lehrerbildung in Europa*. Frankfurt am Main: Peter Lang, 121-140.

I benefited from some feedback from Daniela Elsner, which I used to hone the article.

Chapter Nine: Stakeholder Collaboration

Mehisto, P. (2009) Managing Multilingual Education: Structuring stakeholder dialogue and collaboration. In V. Pavón, J. Ávila (eds) *Aplicaciones didácticas para la enseñanza integrada de lengua y contenidos*. Sevilla: Consejería de Educación de la Junta de Andalucía-Universidad de Córdoba.

I benefited from some feedback from Victor Pavón which I used to hone the article.

Mehisto, P., Asser, H. (2009) Estonian Content and Language Integrated Learning Programme Development Viewed Through the Stakeholder Approach. In M. Karanika-Murray, R. Wiesemes (eds) *Exploring Avenues to Interdisciplinary Research: From Cross- to Multi- to Interdisciplinarity*. Nottingham: Nottingham University Press, 73-88

I wrote this article. I received some feedback from Hiie Asser and the editors which I used to hone the article. Hiie Asser was recognised as an author, as the article reported on research I did with her.

Mehisto, P. (2006) *Applying a Stakeholder Approach to the Development of the Estonian Language Immersion Program*. Tartu: Tartu University.

Due acknowledgement is made to the analysis developed in my MA from Tartu University.

Chapter Eleven: Pedagogy

Some findings from this chapter were reported in the following article.

Mehisto, P. (2008) CLIL Counterweights: Recognising and Decreasing Disjuncture in CLIL. *International CLIL Research Journal*. 1 (1) 93-115.

I received some feedback from the journal's editors which I used to hone the article.

Chapter Thirteen: Conclusion

Mehisto, P. (under publication) *Excellence in Bilingual Education: A Guide for School Principals*. Cambridge: Cambridge University Press.

I have received feedback regarding the Bilingual Education Continuum from Helen Imam, and from colleagues attending a Cambridge University International Examinations Syndicate think tank event. I have used that feedback to hone the continuum.

PART TWO

I declare that, with the exception of attributed quotations, the thesis is entirely my own work.

The word count exclusive of the bibliography and the appendices is 99, 982.

The copyright of the thesis rests with the author and no quotation made from it or information derived from it may be published without the written consent of the author.

A handwritten signature in black ink, reading 'Peeter Mehisto'. The signature is fluid and cursive, with a large initial 'P' and a stylized 'M'.

Peeter Mehisto

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This thesis builds on the ideas and support of many individuals. I am thankful to the authors whose works I have read, to colleagues, fellow students, Institute of Education faculty, research participants and to friends and family who have all knowingly or unknowingly supported me in developing this thesis.

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Finally, I would like to thank colleagues in bilingual education who have given me numerous opportunities to speak and write about my research and experience in Estonia, and to apply new learning in several international projects.

CHAPTER ONE: INTRODUCTION

In Tallinn, Estonia, on 2 October 2000 reporters from three television stations, two newspapers, and one radio station came to witness the Estonian Minister of Education and the country's Minister for Population Affairs, along with a dozen other dignitaries, open the Estonian Language Immersion Centre. The Centre was tasked with coordinating the development of a national language immersion programme. All speakers stressed their support for the Immersion Centre, as well as the community's high expectations vis-à-vis the voluntary early Estonian-language immersion programme that had just been launched in four out of the country's 102 schools that offered Russian-medium education. Over 70 representatives of the diplomatic corps and other national and international immersion programme stakeholders¹ attended the opening. In a few years, the Immersion Centre would coordinate the launch of a late immersion programme and rapidly expand both the early and late programmes. This thesis tells this story and submits it to the critical lens of research.

More specifically, this thesis seeks to determine the management and pedagogical practices that have contributed to the development of sustainable² immersion programming in Estonia. This is the research focus. The thesis documents the establishment of the early and late Estonian-language immersion programmes. As this Estonian programme sought to take into account a large number of factors including learning materials development, public relations, programme management, research into programming, stakeholder relations and teacher training, the thesis examines a wide breadth of management and pedagogical practices. The thesis explores the perspectives of decision-makers (government officials and politicians) who chose to support immersion programme development. In addition, it reports on a study of the first four Russian-language schools that began in 2003 to offer late immersion. This study includes the perspectives of Grade eight and nine immersion students, their parents, teachers, deputy headteachers and headteachers regarding the late immersion programme. Finally, the thesis analyses lesson observations data from these four schools.

First, the thesis distils the actions taken and investments made into developing the early and late immersion programmes from 1998-2005. The description and analysis of this programme

¹ A stakeholder is 'any group or individual who can affect, or is affected by, the achievement of the organization's objectives' (Lépineux, 2005: 100 referring to Freeman, 1984).

² The term sustainability is defined as:
1) the continued operation of the programme;
2) the continued development (improvement) of the programme;
3) continued cooperation among programme stakeholders that aims to achieve commonly held goals that are in the interest of the programme's students.

development stage are triangulated with references to professional literature, to documents created during the programme development process, and to interview data with 15 programme decision-makers. This thesis could have been organised with all the empirical work being presented together after the literature review and the methodology chapter. Instead a decision was made to present the historical account prior to the literature review as this is a key part of the thesis which provides the socio-political content and an account of what at that point Estonian stakeholders considered central to programme development. Second, a literature review is undertaken. The identification of key concepts to be explored in the literature review emerged out of the programme development description and analysis. The literature review provides a series of conceptual lenses to analyse the management and pedagogical practices applied during the development of the Estonian immersion programme. Third, building on the programme overview and literature review, interview and questionnaire data coupled with lesson observation data are synthesised and analysed thematically. Fourth, the conclusion seeks to synthesise the discussion in the thesis by offering both a pedagogical and a management framework for the development of bilingual education.

Socio-political context

Upon the reestablishment of independence in 1991, a large portion of Estonia's population did not speak the official language – Estonian (Vihalem, 2008: 71). As a legacy of five decades of Soviet occupation, the country's Russian-language schools were unsuccessful, generally speaking, in supporting their graduates in achieving sufficient fluency in Estonian to allow for further study through that language or entry into a full range of professions on offer in the labour market (Pavelson, 1998: 212-213). Furthermore, Estonia had restored its independence based on the principle of *restitutio in integrum* or legal continuity of the pre-World War II Republic of Estonia (Pettai and Hallik, 2002: 512). This meant that those people living in Estonia who were not citizens of the pre-war republic or their descendants had to apply for citizenship. '[An] elementary knowledge of the [official] language' was required to obtain citizenship (Kasekamp, 1999: 336). The large number of non-citizens and people who did not speak Estonian was seen by Government as a barrier to social cohesion and as a risk to national stability. Moreover, as successive Estonian Governments perceived the Russian Federation as a potential threat to national security, the country sought additional security guarantees through entry into the European Union and the North Atlantic Treaty Organization (NATO)³. This required that Estonia embrace the values of those organisations, through changes in language and electoral legislation and the implementation thereof, to meet standards set by the Organisation for Security and Co-operation in Europe (NATO, 2004: 4). By having the potential to help increase the number of Estonian speakers among Estonia's population, and thereby the number of potential citizens, immersion programming offered one means for contributing to the national effort to foster internal ethnic integration, and the country's integration with international organisations.

³ NATO is a military alliance founded in 1949 and now comprised of 28 member states.

Immersion approach

In immersion programmes, the student's second language (L2)⁴ is normally used to teach at least 50% of the curriculum over a period of several years whilst the student's first language (L1) is used to teach the remainder (Genesee, 2005: 5). In Estonia, programme entry takes place in kindergarten, in Grade one or in Grade five. Upon entry into Grade one students are usually seven years of age, upon entry into Grade five they are usually 12 years old. Language classes are also offered in both the L1 and L2, and in an L3. In line with Canadian immersion programmes, the Estonian programme aims to support students in developing: Grade-appropriate levels of academic achievement in all subjects taught through Estonian, and in those taught through Russian; Grade-appropriate functional proficiency in Estonian; Grade-appropriate levels of Russian language proficiency; and an understanding and appreciation of the cultures associated with the Estonian and Russian languages. Immersion programmes aim to add value to students' education at no cost to their academic achievement in non-language subjects, and at no cost to L1 development. Pedagogically, immersion programmes are driven by the concept of integration. In principle, language and content are integrated so that students are given rich opportunities to learn and use both language and content simultaneously whilst engaged in cognitively challenging and meaningful tasks.

Rationale

The rationale for undertaking the study grew out of Fred Genesee's (2003: 17) assessment of the Estonian-language programme as 'one of the most [...] carefully planned programs of immersion in Europe and, indeed, around the world', and Hugo Baetens Beardsmore's (2007)⁵ comment that there is a lack of professional literature on the management of bilingual programmes, and even less on management and pedagogy in bilingual education. The Estonian programme benefited from a well-resourced, thorough and systematic process of development that can be contrasted with Canadian immersion programmes which were grassroots-inspired and which did not benefit from national coordination by any one agency. The Estonian immersion programme sought to first learn and follow suggestions from Canadian and Finnish, but also Irish and Spanish consultants, about management and pedagogical issues central to programme development. A clear effort was made to avoid pitfalls identified by Canadian, Finnish, Irish and Spanish consultants.

As stated in the introduction, those developing the Estonian immersion programme took into account a large number of factors that could influence programme development. The complexities of bilingualism and bilingual education are numerous (Baker, 2006; Hornberger, 2008a, 2008b).

⁴ The term *second language* or L2 is used for simplicity's sake, despite the fact that it is possible that a small percentage of students in Russian-language schools may have a first language (L1) other than Russian, thus making Estonian their L3 not their L2.

⁵ Personal communication.

Mackey (1976: 176) identified over 3,000 factors that can impact on the bilingual classroom. His study was primarily linguistically focused, which suggests that there are also many management considerations that he did not take into account. Estonian programme partners identified several hundred considerations for headteachers to keep in mind during programme development (Mehisto, 2007). Estonia's complicated context and history, the country's systematic process of immersion programme development, the large number of factors stakeholders needed to manage during immersion programme development and the lack of professional literature examining both management and pedagogy in bilingual education, all combine to make the Estonian programme worthy of study.

Personal embeddedness

I played a key role in identifying the immersion option and drawing stakeholders in education together to plan and establish the programme. I eventually co-managed the programme, and managed Canadian assistance in support of Estonia's efforts to establish immersion programming. I had previously worked for the Toronto District School Board. In addition, I had worked for the Estonian Ministry of Education and Culture based on a secondment agreement through the Ontario Ministry of Education. These organisations would play a role in the Estonian-language immersion initiative. Also as an Estonian and Canadian national, I often assumed a dual role as both an Estonian and Canadian official. To navigate this dual identity during project development, I placed particular care on articulating values, agreements and plans, and on identifying any divide within and between those elements, and between the perceptions and understandings of Canadian and Estonian officials with whom I worked. This meant that from 1998-2005, while working with stakeholders to establish and develop immersion programming, I co-authored some of the documents (project proposals, annual reports, plans, minutes, letters) that are examined in this thesis. I have had a working relationship with many of the teachers and most of the headteachers and deputy headteachers who are part of the empirical study. I have been part of the Immersion Centre's steering committee, and have cooperated to some degree with all of the decision-makers interviewed for this study. From 2005 onward, I have worked occasionally with the Immersion Centre or its successor organisation as a consultant and/or trainer. The research conducted for this thesis was financed by the Estonian Ministry of Education and Research which had declared an interest in using the results of the study to improve immersion programming. A report on the research was submitted to the Ministry in 2008. This history has facilitated my access to schools and decision-makers. It may also have fostered more frank and open dialogue than might be the case if the research subjects had been unknown to me.

Outline of chapters

Chapter two recounts the historical antecedents of the Estonian-language immersion programme, and the measures that were taken to lay the groundwork for establishing the programme. It describes the political and socio-cultural context within which programme stakeholders operated and details ways in which key stakeholders worked together to build a common knowledge base about immersion. The chapter also describes some of the risks faced by programme developers.

Chapter three discusses the development and implementation of the early and late Estonian-language immersion programmes. It describes early immersion programme parameters, and analyses programme achievements and concerns after its first year of operation. The chapter also documents late immersion programme development and describes its parameters. Pressures to expand late immersion programming are explored. Fifth-year results of the late and early immersion programmes are examined by scrutinising the breadth and depth of related investments. Finally, emergent issues that threatened the stability of the programmes are analysed.

Chapters two and three are partly biographical in nature as they relate to events from my professional life. The aim is to triangulate my understandings with information from documents about the development of the Estonian immersion programme and with data from interviews with key decision-makers, and to synthesise these into one narrative. Furthermore, those understandings are triangulated with references to the professional literature. Chapters two and three describe an informal process of action research, as the development of the Estonian programme involved an ongoing process of inquiry, problem formulation, planning, data collection, analysis, and reformulation of plans. In these two chapters, I engage in researching actions I undertook in cooperation with other immersion programme stakeholders. This is an act of action research to the extent that I describe and interpret those programme development actions and submit them to evaluation through the use of documents and data from decision-maker interviews. Moreover, these two chapters seek to capture a wide range of factors including practices and mechanisms that were used to build both the early and late immersion programmes whilst identifying additional pertinent contextual factors. Thus, chapters two and three provide an in-depth description of context and begin to answer the primary research question – what are those management and pedagogical practices that have contributed to development of a sustainable immersion programme in Estonia.

Chapter four examines the terms bilingualism, multilingualism and plurilingualism. An exploration of how these terms are applied to the individual, a group and a region, as well as ways in which they are perceived by supranational organisations, states, groups, and individuals, helps serve as a basis for interpreting the Estonian immersion programme, and the political, linguistic and educational context within which it operates. This exploration helps build an understanding of one of the ultimate goals of bilingual education – bilingualism. Knowledge of these terms can contribute to the effective and systematic management and delivery of bilingual education particularly in

circumstances where language has and is being used for political purposes, as has been the case in Estonia.

Chapter five focuses on the benefits of bilingualism for the individual, concomitantly making links to societal benefits. In particular, economic and cognitive benefits of bilingualism are explored, as they are not widely discussed in the bilingual education literature. These benefits can partly serve as a basis for discussions with decision-makers regarding the need for improved access to bilingual education. In the Estonian context, these benefits take on a particular importance, as they provide additional justifications for learning Estonian, a language which some members of large language groups may consider a minor language with a limited scope of use.

Chapter six explores the concept of bilingual education and key terms associated with the phenomenon such as additive and subtractive bilingualism. Prestigious bilingual education is analysed in depth. Its distinguishing characteristics are explained. This includes a description of the potential long-term impact of this form of education. This helps to situate the Estonian immersion programme within the domain of prestigious bilingual education.

Chapter seven examines student achievement in immersion programmes. Seminal Canadian and American studies are reviewed in depth, as evidence from these studies was used to justify programme development decisions in Estonia. The chapter also reviews criticisms made of immersion programmes. The often-cited example of the Hong Kong late immersion programme, where student achievement fell below expectations, is discussed. Finally, the chapter reviews research evidence from less intensive L2 immersion-type programmes published under the heading CLIL. The evidence presented in this chapter provides a rationale for the development of the Estonian immersion programme.

Chapter eight discusses the features of successful immersion programmes and of effective learning environments. Research pertaining to headteacher leadership and management, and to pedagogy are the two primary foci of the chapter. Particular attention is given to learning, and the role of language and autonomy in learning. The potential negative impacts of immersion are described, as are ways managers can work to reduce these within their schools and communities at large. This research evidence serves as a frame of reference for analysing the Estonian programme's pedagogical and management practices.

Chapter nine analyses the identification of stakeholders in bilingual education. Stakeholders other than teachers, students and parents, have received little attention in the professional literature on bilingual education. The chapter explores how stakeholders can cooperate to create professional learning communities through among other means distributive leadership, so they can co-construct the breadth and depth of knowledge required to build effective bilingual programmes whilst increasing their capacity to respond to emergent issues. Stakeholder cooperation was a central factor in the development of the Estonian immersion programme. The stakeholder approach, which

is a managerial tool, offers a conceptual lens for understanding Estonian immersion programme management.

Chapter ten explains the epistemological and ontological stance which underpinned the empirical study, as well as the methodologies used in the collection and analysis of data. The study is informed by moderate social constructivism, and complexity theory. The characteristics of each of these theoretical perspectives are discussed, as are the use of case study, action research and mixed methods. Data collection methods are described concomitantly with ethical considerations. Research goals and questions are presented, and the ways in which data were analysed are explained.

Chapter eleven presents and analyses data gathered from lesson observations and, in part, correlates this with data from teacher and student questionnaires. Analysis is provided of the extent to which teaching and learning practices are aligned with the previously discussed features of effective learning environments. Research data are used to draw out teacher pedagogical practices, teacher and student actions and behaviours, and the dynamics of teacher-student relationships.

Chapter twelve presents and analyses research data from student, parent and teacher questionnaires, and from interviews with school managers (headteacher and deputy headteacher), and decision-makers. Data are used to uncover management practices and mechanisms that have contributed to the development of sustainable immersion programming, those that may be undermining it, as well as the forces and mechanisms that have driven stakeholder cooperation.

Chapter thirteen draws together the management and pedagogical complexities distilled during the development of the Estonian immersion programme, the literature review and the empirical chapters, and reprocesses these in the form of two frameworks for teaching and learning in, and for the management of, bilingual education.

CHAPTER TWO: PROGRAMME CONTEXT AND GROUNDWORK

This chapter provides an account of the historical antecedents of the Estonian-language immersion programme, and the measures that were taken to lay the groundwork for establishing the programme. More specifically, it describes the political and socio-cultural context within which the immersion programme's stakeholders operated. It details ways in which key stakeholders worked together to build a common knowledge base about immersion and build context that was favourable to immersion. In addition, it documents how the process for planning an immersion programme drew on Estonian, Canadian and Finnish expertise, and how partnerships were built and sustained. Finally, the chapter describes some of the risks taken to prepare the way for the immersion programme.

As I was part of the coalition of stakeholders who helped establish the immersion programme and eventually one of the co-managers of the programme, I act as my own informant and research some of my own actions. My account is, however, empirically grounded through references to professional literature, newspaper articles, documents such as plans and reports, and through interview data from decision-makers. Equally importantly, the sources for these references also provide considerable information about the development of the immersion programme. Extensive detail is provided as this offers evidence of the constituent elements of those practices (actions, decisions, processes) which contributed to the development of the Estonian immersion programme.

Identifying the need

After the collapse of the Soviet Union and the reestablishment of Estonian independence in 1991, Canada co-financed in partnership with various Estonian government agencies a wide variety of reform projects in Estonia. In 1998, Canadian support for a major initiative to help Estonia build its capacity to translate its legislation into English and the entire body of European Community law known as the *acquis communautaire* into Estonian was drawing to a close. Seeking to identify the next major potential Estonian-Canadian joint project, the Canadian Embassy Office in Estonia approached the Estonian Minister for European Integration who identified a need for Estonia to improve Estonian language learning options. Although considerable investments had been made by the state into improving and expanding opportunities for Russian speakers to learn Estonian, the majority of high school graduates from Russian-language schools lacked sufficient Estonian language skills to compete in the labour market or to continue tertiary studies through Estonian (Pavelson, 1998: 212-213).

Also in 1998, ‘considerable pressure was being brought to bear on Estonia by the Nordic countries’ with Estonia being told that it ‘wouldn’t get into the EU [European Union] until a solution was found for the language issue’ (Asari, 2009).⁶ The lack of Estonian language knowledge among Estonia’s sizable Russian-speaking community (approximately 30% of population) was seen by the country’s neighbours as a potential source of political instability and ethnic conflict. More specifically, Estonian language knowledge was a prerequisite for non-Estonians obtaining citizenship, and by 1998 the number of Estonian residents obtaining citizenship each year was in decline, raising the possibility that by the end of 2003, just prior to its expected EU accession, Estonia would still have a high percentage of non-citizens, and thus, partly disenfranchised residents among its population (Poleshchuk, 2001: 6). In this context, it was clear that the extensive measures taken to date to support non-Estonian speakers in developing a degree of fluency in Estonian had not been sufficient. Not taking further action to support language learning would have placed Estonia at risk of losing or delaying access to the economic and national security benefits of EU membership.

Political and socio-cultural context

‘Mistrust of Russia runs deep’ among Estonians (Kuus, 2002: 302). Russia first conquered the territory which is today Estonia in 1711. In the late 19th and early 20th centuries russification policies sought to displace the Estonian language from education and other areas of public life (Kasekamp, 2010: 84). Estonia fought a war of independence against Soviet Russia from 1918-1920. In 1920, Estonia and Soviet Russia signed a peace treaty in which Russia recognised Estonian independence in perpetuity (Zetterberg, 2009: 395). In 1924, a handful of Estonian communists backed by the Soviet Union engineered a coup in Estonia, which failed (Raun, 2001: 115). In 1939, Soviet Russia began a process that would lead to the military occupation of Estonia in 1940, and again in 1944 after the intervening 1940-1944 German occupation. The first years of Soviet occupation were characterised by a process of ‘centralized denationalization’ that included ‘systematic deportations, executions, and population transfers’ (Kello, 2009: 7), and a destruction of existing social and democratic institutions. The remainder of the occupation would see extensive immigration into the country, russification, as well as continued restrictions on freedom of speech, assembly and travel (Raun, 2001: 149-156, 169-239; Zetterberg, 2009: 467-590). Language, culture, nationhood, democracy and national values were all considered under threat.

After the reestablishment of Estonian independence in August 1991, a security threat from Russia remained omnipresent. Russian troops did not fully withdraw from Estonia until August 1993. Even after the withdrawal of Soviet troops, retired Soviet/Russian army and KGB⁷ officers living

⁶ This and further references to Asari (2009) refer to interview data.

⁷ Committee for State Security (Komitet Gosudarstvennoĭ Bezopasnosti) which constituted the Soviet intelligence and internal security services.

in Estonia, some of whom were between the ages of 35 and 50, greatly outnumbered Estonian military personnel on active duty (Lange, 1995: 131; Tayler, 2002: 70-71). Henry Kissinger (1994) viewed Russian peace-keeping proposals in its 'near abroad' including Estonia, as 'indistinguishable from an attempt to re-establish Moscow's domination'. Moscow's tone vis-à-vis the Baltic states of Estonia, Latvia and Lithuania was characterised as 'negative, unhelpful, and bullying' (Blank, 1998: 50). Blank (*ibid.*) argues that prior to mid-1997 Russia continued to have 'hegemonic aspirations' regarding the Baltic states. Ilves (2001) concurred arguing that Russia's labelling of Estonia as the 'near abroad' is synonymous with its understanding that Estonia is really part of the 'temporary abroad'. Ilves (2001) referred to an incident in 1997 where:

[...] a senior Finnish Foreign Ministry official managed to convince the United States not to send F-16 fighters to participate in the Baltic Challenge PfP (Partnership for Peace)⁸ summer event, since their presence might aggravate the Russians. These examples show how slow to disappear was the conception of Estonia as a second rate country, which lacks those rights that are taken for granted in the "distant abroad".

Moreover, Russia regularly asserted that it intended to protect the rights of ethnic Russians in Estonia (Blank, 1998; Ilves, 2001). For example, Russian Foreign Minister Kozyrev stated that Russia was 'prepared to resort to the most far-reaching, tough and radical measures, but within the framework of international law', and on another occasion that Russia had the right to take any measures necessary, be they of 'an international, economic, political and other nature', to protect the rights of ethnic Russians living abroad (Kauppila, 1999: 26-27 referring to Kozyrev, 1993a; 1993b). This later statement did not include any mention of international law. In 1995, Russia doubled customs duties on Estonian goods, claiming Estonia's discrimination of its Russian-speaking community (Ritchie, 2003: 4). Russia used international organisations such as NATO, the Organisation for Security and Cooperation in Europe (OSCE) and the EU to put pressure on Estonia to accord greater rights and privileges to its Russian-speaking minority (Kuus, 2002: 311). Kuus (2002: 298), who has analysed political narratives in Estonia, states that the Estonian Government perceived integration with NATO and the EU 'as the sole possible protection against [the] Russian threat'. As NATO and the EU both espoused integration of minorities as a value, Estonia sought to demonstrate that it held a similar set of values, harmonising 'its policies with those of the EU and NATO' by relaxing its citizenship laws to facilitate integration of the Russian-speaking population (*ibid.*: 297).

In addition to external pressure from the EU, NATO and Russia, Estonia was also subject to internal pressure from ethnic Estonians and from the presence of a large non-Estonian population. Four-fifths of ethnic Estonians (men, women, of diverse age groups, of diverse educational backgrounds) saw Russia as a threat to Estonian statehood, as opposed to 28% of the country's resident non-citizens (Oolo, 2000). Lange (1995: 132) speculated that an 'aggressive Russian

⁸ It is noteworthy that the PfP is a NATO programme. Finland is not and has never been a member of NATO.

policy could perhaps rely on parts of Estonia's sizable Russian minority. In 1993, 'no fewer than half' of Russian citizens residing in Estonia who took part in the Russian parliamentary elections voted for Vladimir Zhirinovskiy who had threatened to dump nuclear waste on Estonia (Eyal, 1993).

Therefore, not only was Russia seen as a security threat to Estonia, but the integration of Estonia's Russian-speaking community became all the more pressing, as the community's integration, it could be argued, would weaken Russia's claim that it needed to protect Russian speakers in Estonia. There was also an understanding that if ethnic Estonians and non-Estonians were not better integrated this 'could become dangerous both socially and from the point of view of security policy' (Government of Estonia, 2000: 17). In such a context, international projects which could support Russian speakers in learning Estonian and thereby meeting the language requirement for Estonian citizenship were likely to be welcomed by its Government. Former Minister for Population Affairs Paul-Eerik Rummo (2009) stated in a retrospective interview that he supported the immersion project during its inception because he considered knowledge of Estonian among the country's minorities as 'essential' to national 'stability and security'. In 2004, Lavendar and Gazaille (2004: 12) in their evaluation of Canadian-supported programmes in the Baltic states gave the immersion project 'full marks for relevance'.

Launching a stakeholder-inclusive planning process

In response to the Estonian Minister for European Integration's identification of the need to improve language learning opportunities for Russian-speakers, Marina Asari, Head of the Canadian Embassy Office in Tallinn and I travelled around Estonia meeting educators and government officials to ascertain concerns relating to the learning of Estonian by native speakers of Russian, and to gauge interest in Canadian immersion programmes. Communication at these meetings was facilitated by the fact that Marina Asari is a native speaker of both Estonian and Russian, and that I am a native speaker of Estonian. All those we met expressed an interest in learning more about immersion programmes. This provided the incentive for the Canadian Embassy Office to invite Estonian and international stakeholders to attend a roundtable discussion. Previous Canadian-Estonian cooperation provided the 'social and political capital' (Bourdieu, 1977) for those invited to the meeting to take the invitation seriously. According to Marina Asari (2009), by 1998 'a sufficient level of trust had been established in Canada and in Canadian project managers' to pave the way for an immersion project. This view was later echoed by the Minister of Education Mait Klaassen (cf. Appendix A) who referred to the above-mentioned Estonian translation initiative, which had been heavily supported by Canada, as a 'model for project development and implementation.'

Stakeholders included several representatives of the Estonian Ministry of Education (EME). This was done so as to increase the likelihood that the Ministry's senior leadership, and language and education policy divisions would work together to build a common understanding of immersion and its possible application in Estonia. Other institutions being represented included the Estonian

Language Institute (mandated to protect the Estonian language), the Non-Estonians Integration Foundation (Integration Foundation), the European Union's Phare foreign aid programme, the United Nations Development Programme (UNDP), the Canadian Embassy and the Finnish Ministry of Education. It was a high status group capable of influencing public as well as government opinion, policy and financing decisions. In June 1998, an 11-member Steering Committee consisting of these same stakeholders began to meet on a monthly basis at the Canadian Embassy Office. I was also a member of the committee.

One member, Kai Võlli (2009)⁹, who in 1998 was an adviser in the EME's General Education Department, stated that when the committee began its work she was 'more curious about the idea, than a convinced supporter of immersion.' In the Estonian context, she considered immersion programmes as isolated, special case examples, which 'could not be replicated on a national level, and which would not necessarily be sustainable – teacher resigns, immersion dies.' Võlli asked Auli Udde, Principal Estonian Language Adviser, in the same Ministry department to attend the first steering committee meeting. Udde (2010)¹⁰ affirmed that that first 1998 meeting 'did not convince her in the slightest' of the merits of immersion. Epp Rebane (2009)¹¹, then Head of the EME's General Education Department, remarked that her 'initial stance was sceptical and cautious', as a cursory description of immersion programmes and their results did not seem 'possible or credible.' However, despite these beliefs, these officials were prepared to learn more about immersion. The committee approved an Estonian, Canadian and Finnish project that sought to start a process of knowledge and partnership-building that would allow participants to decide on whether an immersion project was appropriate for Estonia or not.

An initial knowledge-building and planning exercise

The Canadian government was prepared, in principle, to provide CAD 99,000 for the proposed project. By supporting language learning, the immersion project had the potential to increase the life-chance of young Russian-speakers and to contribute to their social, political and economic integration into Estonian society. According to a senior Canadian official who at that time spoke to me off-the-record, it was in Canada's interest to support initiatives fostering regional stability in Europe, as these reduced the probability that Canada would be drawn into another European conflict as had been the case several times during the 20th century. Commenting on Canada's decision to support the immersion project Canadian Ambassador to Estonia (1999-2002) Peter McKellar (2011)¹² recalled 'that the Canadian government was looking for ways in which it could make a particular contribution to Estonia's progress toward integration into Western institutions'. Canada had 'successful experience of language immersion' to share,

⁹ This and further references to Võlli (2009) refer to interview data.

¹⁰ This and further references to Udde (2010) refer to interview data.

¹¹ This and further reference to Rebane (2009) refer to interview data.

¹² Personal communication.

and ‘the professionalism and creativity of the project managers’ inspired confidence, as did ‘the willingness of the [Estonian] President to [...] express his enthusiasm for it [the project] publicly’ (*ibid.*). Finnish Ministry of Foreign Affairs and Finnish National School Board officials expressed an interest in supporting the immersion initiative as well, as did the representatives of the other institutions who were on the committee. My former employer, Robert McConnell, at the Toronto District School Board (TDSB) was willing to share his expertise, but the TDSB was not prepared to take on legal responsibility for the project. In order to access Canadian financing, a legal entity had to be found who would apply to the Canadian International Development Agency (CIDA) for financing. Marina Asari from the Canadian Embassy Office approached Jüri Wallner, an Estonian-Canadian, who was a member of the Rotary Club in Ottawa, Canada, to enquire whether the Rotary Club would consider taking on the project. Jüri Wallner was assured by Marina Asari and myself that I would manage the project, and write the project proposal (application for financing) and the subsequent narrative and financial reports. The level of trust that had previously been established with this Estonian-Canadian, who had worked through the Canadian Embassy Office on projects advising Estonia on health care reform, was sufficient for him to convince the Rotary Club to take on legal responsibility for the project. CIDA approved a proposal from the Rotary Club within weeks. CIDA’s capacity to react quickly helped to ensure that key people central to project implementation were available and prepared to be involved with the project. All of the above-mentioned stakeholders assumed a certain degree of risk, balanced by previously built ‘social capital’ and confidence that all the partners had a reputation of delivering on their commitments.

In the Rotary Club proposal (1998: 2) to CIDA, the Club committed to:

1. support the Estonian Ministry of Education in organising an international seminar on language learning, and immersion in particular.
2. allow for key Estonian planners to travel to Canada for practical hands-on training organised in conjunction with the Toronto District School Board.
3. advise senior decision-makers in Estonia on the policy and political implications of immersion programmes and give practitioners an overview of how to apply immersion strategies.

The international seminar was prepared in close cooperation between Auli Udde from the Estonian Ministry of Education (EME) and myself. In preparation for the seminar, the EME sent a survey to 31 schools (26 Russian-language, three Estonian-language and four Estonian and Russian-language schools). The survey sought to ascertain: to what extent schools were familiar with the concept of language immersion; how schools understood this educational approach; how schools taught Estonian; which alternative or complementary paths or strategies were in use in addition to those prescribed by the national curriculum; and, the conditions and activities that headteachers, teachers, parents and students considered a prerequisite for successfully introducing immersion.

Thirteen schools responded to the survey. Most of the respondent schools were already providing some form of additional Estonian language learning above and beyond that required by the

national curriculum, and used the term immersion to refer to a wide variety of programmes (Vare, 1999a: 5). Many of these programmes did not fall within the internationally accepted definition of immersion requiring 'at least 50% of instruction through the medium of the second language' (Genesee, 2005: 5). In general, the attitudes of respondents towards immersion were positive, yet they raised some concerns and described needed investments. Respondents proposed financing immersion-specific learning materials development, teacher training and extra-curricular language camps (Eskor-Kiviloo, 1999: 84-85). They cautioned that language learning should start in kindergarten, and that the learning of subjects should not suffer due to a change in the language of instruction (*ibid.*).

The three-day international seminar was held in November, 1998 and was attended by 51 people: 15 representatives from schools serving Russian-language students including those surveyed by Eskor-Kiviloo; ten from local or national government; seven from Estonian institutions of higher learning (one of whom also worked in a school); six from NGOs; five from potential foreign partner institutions; four from foreign universities; three from foreign embassies or the UNDP; one politician; and one teacher trainer. This constituted a wide range of stakeholders. However, representatives from those schools considered to be antagonistic to the idea of immersion were not invited. This was a conscious effort to exclude people who could potentially undermine any future immersion initiative.

The seminar programme aimed to build a case for immersion education, to provide key stakeholders an opportunity to discuss the possibility of implementing immersion programming in Estonia and to lead to a decision on how to move forward. Keynote speeches were given by County Governor and by EME Adviser Kai Völli. Völli carried considerable moral authority. At the time, she was opposed to the widespread implementation of the immersion approach. Words of welcome were also given by the EME's Principal Language Policy Adviser, representatives of the Finnish and Canadian embassies, and the Director of the Integration Foundation. Through their presence, these local and international officials accorded the event high status. Moreover, these same people could potentially help launch a national immersion initiative. In addition, Estonian officials could potentially decide an immersion initiative was not required or was unfeasible.

The first seminar presentation provided an overview of Canadian immersion programme goals and characteristics, and research evidence regarding results typically obtained by immersion students (Genesee, 1999: 7-16). This provided evidence of the viability of the immersion option. The typology of immersion programmes is discussed in chapter six and immersion student achievement in chapter seven. McConnell (1999: 17-20) detailed the practicalities of launching Canadian immersion programming, including the need to plan at a national or regional, local authority and school level. Nordgren and Bergström (1999: 21-28) gave an overview of teacher-led activities in Finnish immersion classrooms and stressed the importance of teachers cooperating with researchers. The fact that Finnish and Canadian presenters expressed similar messages about immersion helped to build confidence in the option. Two Estonian educators from Russian-language schools provided evidence that immersion could be successfully implemented in Estonia. (Asser, 1999: 29-34; Lille, 1999:35-40). All of the above speakers touched on the importance

of research, the need to be systematic, to have clearly stated goals, to work with parents and to articulate certain guiding principles such as the voluntary nature of these programmes, and the need to support L1 in addition to L2 development.

Estonian researcher Silvi Vare (1999b: 45-56) suggested that the country's strategy for language learning be renewed. She identified research showing that between 1991-1998 the level of Estonian language knowledge among non-Estonians had remained static and described immersion as one possible way forward (*ibid.*: 46). Further research was presented showing that the vast majority of Russian-speaking parents and graduating high school students preferred a bilingual (Russian, Estonian) model of education (Vassiltšenko, 1999: 60). Parental interest would be a vital ingredient in the successful launch of any voluntary immersion programme. In addition, Vassiltšenko (*ibid.*: 59) reported that teachers in Russian-language schools were the most resistant to change as their vision of the future was very similar to the *status quo*. This conflict between parental and student wishes for bilingual education and resistance to the idea in Russian-language schools, brought to light a tension that programme planners would need to take into account. Another Estonian academic spoke of the role of language in forming identity and the need to support the learning of Estonian by Russians living in Estonia in order to support their integration into the Estonian cultural sphere and thereby reducing Russian government influence on these individuals (Rannut, 1999: 61-66). This intervention reinforced the belief that Russia and non-integrated ethnic Russians in Estonia posed a threat to national security. Rannut also pointed out that voluntary immersion programmes could work in cities such as Narva where native Estonian-speakers constitute less than 5% of the population (*ibid.*). A presentation about bilingualism helped emphasise that it was not a radical concept, but the norm in the world at large (Õispuu, 1999: 67-69). Õispuu (*ibid.*) also stressed that Estonia already had considerable expertise in the field, but cautioned that effective programming required systematic planning and stakeholder involvement.

Seminar participants spent time analysing four different types of immersion: early total, early partial, delayed, and late immersion. They concluded that early total immersion was the most suitable model for Estonia (Vare, 1999c: 71). They concluded that early immersion had been proven to be successful in other countries, that early immersion suited even less academically inclined students, and that parents are more ready to accept immersion at the elementary, as opposed to secondary school level (*ibid.*). They also concluded that more Estonian-language teachers would be available due to declining enrolment, that it is easier to train class teachers over subject teachers, and that Estonia could draw on its own experience with early immersion (*ibid.*).

Five groups then worked to determine guiding principles and start-up activities, as well as associated risks. Work was framed under the following headings: EME (pre-programme start-up); teacher pre-service training; teacher in-service training; learning materials; parents and how to inform them; schools, institutions of higher learning, school managers, local government, national government and the EME; and public relations (*ibid.*: 72-78). The heading regarding parents refers to informing them, which combined with the fact that parent groups were not expressly invited to the event, reveals that parents were not seen as full partners in the discussion.

Despite many of the participants stating that they did not have a full grasp of the immersion approach, many of the issues raised during group work demonstrated that there was considerable knowledge about immersion among the participants. Some of the considerations raised in group work were: a need to define goals/roles; a possible lack of teacher trainers; the possibility that immersion education may be overpoliticised; that independent research would be central to programme success; that there would be opposition to the move; that pilot schools should apply for the privilege of participating; that stakeholders needed to be involved in planning; that people needed training in planning the change; and that parents needed to be worked with and helped in forming a group in support of immersion (*ibid.*).

Seminar participants adopted a final communiqué (Vare, 1999d: 79) which states that:

The seminar participants arrived through discussion at the following conclusions:

- It is sensible to establish language immersion programming, because 30 years of international experience and research have shown that immersion is an effective language learning method, which ensures the learning of the target language without adversely affecting a student's mother tongue, identity or academic achievement;
- successful implementation of language immersion programming in Estonia requires thorough preparation.

The seminar participants recommend that:

- the Ministry of Education, in cooperation with various stakeholders and foreign partners, create a project aimed at winning support for and establishing a language immersion programme, and that it create the preconditions required for launching the project;
- in developing the proposed immersion project it is important to take into account the knowledge and experience garnered in Estonia and abroad, and to take into account the training of teachers, school managers and education officials, required education policy decisions, the development of learning materials, public relations and cooperation with parents;
- regional differences and the various languages taught in Estonia be taken into account in developing and implementing the immersion project.

The communiqué in itself reflects not only a desire to proceed with the immersion initiative, but it works to counter possible opposition to the initiative by stating that research has shown that immersion does not adversely affect first language learning or academic performance in general. Moreover, it recognises the complexity of the task and the need for stakeholder cooperation. In addition, it not only speaks of the need for teacher training, but recognises the need for education officials to build their knowledge base. An understanding of the importance of stakeholder relations is reflected in the fact that the communiqué was sent to 30 major stakeholders including

those in national, regional and local government, in institutions of higher learning, and in foreign representations such as the European Union and the OSCE. An 89-page compendium (Vare, 1999e) containing all seminar speeches, group work summaries and the final communiqué was published in Estonian and Russian. It was distributed to all seminar participants, the 30 major stakeholders and to all Russian-language schools. This signalled the importance placed by the EME on building awareness among stakeholders, managing knowledge, drawing conclusions and taking action.

Building ownership, relationships and plans

In January 1999, a delegation of eight Estonians visited Canada for 12 days to learn about immersion programmes offered by the Toronto District School Board (TDSB). The delegation included teachers, headteachers, deputy headteachers, researchers, as well as local and national government officials, including the Secretary General of the EME. This demonstrated the Estonian government's commitment to the proposed immersion project, as well as to stakeholder inclusion. Yet, just prior to the visit, Secretary General, Georg Aher said he might have to withdraw from the delegation due to other commitments. Aher and I had a frank and constructive dialogue framed in the context of the Ministry's long-term relationship with Ontario. Aher proposed a 'win-win' solution, flying to Canada for a more limited period of time. His decision to travel was important not only as a signal to Canadian and Estonian stakeholders, but it also had the effect of helping him to better understand immersion. Whereas prior to travelling he expressed doubt about the widespread applicability of immersion, after the trip, he considered that it would be suitable for even russified areas of Estonia where students would have limited out-of-school access to Estonian. Equally importantly the trip was a seminal moment for other participants. Ministry official Rebane stated (2009) that 'I only fully began to believe in it when I saw with my own eyes in Canada how effective it was'. Ministry official Udde (2010) concurred that it was the people she met in Toronto and 'the [Canadian] children's language skills' that convinced her that immersion was a viable option.

The trip also required meticulous advance planning and discussion with both Canadian and Estonian partners. Goals were established for the visit and a series of questions that participants were hoping to have answered were compiled and shared with the TDSB (cf. Appendix B). Moreover, hotels, transportation, interpretation issues and even how people would be welcomed were discussed in detail with Robert McConnell who coordinated the Canadian side of the visit. He arranged meetings with an array of senior TDSB officials, school managers, teachers, support staff, parents and students. In addition to the above, the delegation met with an Ontario Ministry of Education official, representatives of Canadian Parents for French¹³, as well as with University of Toronto and York University faculty. Issues covered included

¹³ Canadian Parents for French (CPF) was founded in 1977, and is a powerful lobby that is dedicated to the promotion and creation of French-second-language learning opportunities for young Canadians.

programme management, public relations, cooperation with parents, research, in- and pre-service training, financing, the development of learning materials, teacher support mechanisms, the advantages and disadvantages of various types of immersion programmes, network building, and curriculum development. McConnell worked to connect personally with members of the delegation and to facilitate their building of ties with potential Canadian partners. Relationship building is considered central to successful change initiatives (Fullan, 2001: 4).

During the visit to Toronto, formal debriefings took place each day in order to draw conclusions about what had been learned and how this might or might not apply in the Estonian context. An entire day at the end of the visit was given to articulating what an immersion project in Estonia should achieve and how this could be done. In other words, the trip was not simply a fact-finding mission, but it was also designed to allow the group to discuss and distil their learning, and to plan for programme implementation.

A results-based management (RBM) framework, which was created by CIDA, was used to articulate plans. As a first step, the long-term intended impact of the future immersion programme was agreed upon. These four intended impacts were:

- I. With the support of society, through a network of immersion schools, participation of non-Estonians in Estonia's economic, political and social life will have increased and this increased participation will have created a wider avenue of opportunities for integration and stability.
- II. Non-Estonians will feel more secure living in Estonia and will consider themselves equal members of society.
- III. By allowing for an increased diversity of choice and competition, immersion schools will have contributed to the overall improvement of the quality of education.
- IV. The project will have helped to guarantee the stability and the development of Estonian-language schools in those areas where Estonians are in a minority (Appendix C).

These first two intended impacts were associated with security and stability in society that could be achieved through integration. They echoed Estonia's concerns about security, seeing the alienation or separateness of ethnic non-Estonians as a greater threat to national survival than their integration. The fourth desired impact was motivated by a concern among members of the delegation that Estonian-language schools, in areas where Russians were in a majority, could become immersion schools for Russian-speakers, thereby marginalising native speakers of Estonian. Guided by the impacts, the delegation agreed on four intended outcomes for achievement within four years.

- I. A well-functioning Immersion Centre with the appropriate know-how and empowerment has been established. This Centre co-ordinates research in immersion education, provides service in methodology, disseminates information,

organises public relations and co-operation among all interest groups.

- II. Curricula and teaching materials specific to immersion have been created and conditions for their further development guaranteed.
- III. Working model(s) of language immersion programs which can be implemented in different types of schools in Estonia has/have been defined.
- IV. Immersion schools have become an integral part of the Estonian educational system operating without foreign assistance (Appendix C).

The first intended outcome, the establishment of an Immersion Centre, was motivated by a desire to avoid what Canadians had told the Estonian delegation were their biggest mistakes – a lack of proper planning, and a lack of coordination among stakeholders and regions. The fourth outcome was intended to help Estonia plan for sustainability and to reassure CIDA that Estonia was serious about assuming responsibility for immersion programming.

The RBM framework also identified nine primary stakeholders: the EME; county governments; local governments; schools; kindergartens; Estonian institutions of higher learning; foundations/alternative funders; media; and foreign partners. Within several of these broad stakeholder categories, a further breakdown of an organisation's internal stakeholders was listed. For example, schools as a stakeholder group included the school's advisory board (governors), school managers, teachers, parents and students. This reflected an understanding of the complexity and the inter-connected nature of the project. The framework also listed nine secondary stakeholders, and in the case of foreign partners, subcategories of stakeholders: universities; embassies and representations; Canadian Parents for French; European Immersion Institute; UNDP; OSCE; and the European Commission. This demonstrated an intention to seek further access to knowledge from, for example, foreign universities and Canadian Parents for French, and additional financing from the European Commission and the UNDP. By gaining OSCE approval, the Immersion Centre could help Estonia meet a foreign policy target. The Estonian Government saw the OSCE mission to Estonia as a potential obstacle to both NATO and EU membership, as its mandate was to foster integration between language communities – a task normally assumed by a nation without external assistance. Upon the closing of the mission in 2001, the Estonian Prime Minister Mart Laar declared: 'The withdrawal of the OSCE mission from Estonia raises us to the ranks of the normally functioning democratic countries' (Kuzio, 2002).

The identification of primary and secondary stakeholders brought with it at the very least an understanding that to be successful, the immersion project needed to involve these groups and reach agreements with them. One RBM framework success indicator was 'memoranda, minutes [...], agreements' from stakeholder meetings (Appendix C). It is also noteworthy that a decision was made to 'ensure that women gain equal benefit from the project at all levels' (*ibid.*). This was a major criterion for measuring the success of CIDA programming, and was not incompatible with the views of the EME officials involved with the project.

The partially completed RBM framework was presented to the Estonian Minister of Education, Mait Klaassen, who travelled to Toronto to meet with the Estonian delegation that briefed him on what had been concluded during the visit. He flew on to Ottawa where he met CIDA President, Huguette la Belle, and CIDA Vice-president, Charles Bassett. I attended that meeting as did Robert McConnell. CIDA officials said they would welcome a major project proposal to help Estonia plan for and establish a national Estonian-language immersion programme. Klaassen would later also have to defend the project proposal before the Estonian Ministry of Finance's inter-ministerial foreign aid commission, which Klaassen (2009)¹⁴ referred to as a 'very thorough grilling that lasted one hour and a half.' Preparations for the project resembled an obstacle course, which required stamina from all involved. Moreover, a project of this nature had to fight for territory on the agenda of many decision-makers.

Reinforcing relationships and agreeing on plans

This visit, in common with all visits of Estonians to Canada or of Canadians to Estonia, was followed by a series of letters from the Estonian side to its partners. These were carefully constructed not simply to thank people, but to ensure that they helped to cement ties and to move the project forward. For example, Minister Klaassen (Appendix A) wrote to Marguerite Jackson, the TDSB Director of Education after his 1999 visit to Canada. The letter was copied to three other senior TDSB officials and the Rotary Club. This allowed the other TDSB senior officials who had met Secretary General Aher to gain some recognition for their work; however, the letter could have done more to try to build the positive image of these TDSB officials. The letter's mention of Secretary General Aher was intended to show the high level of commitment accorded to the project by the EME. The body of the letter was one page in length with many short paragraphs to increase the possibility that it would be read. It explained the long-term nature of the TDSB's relationship with the Estonian Ministry, and the Estonian context in order to increase TDSB understanding of Estonia's need for immersion programming. The mention of the long-term relationship with Estonia aimed to build a sense of security in the TDSB, and make it more difficult to ignore the request. The quality of the study visit programme was stressed, and direct reference was made to Robert McConnell not only to thank him, but to position him for a leading role in the planned CIDA-financed project in support of the Estonian immersion initiative. This was done to reduce the possibility of the TDSB appointing another less qualified and/or less committed individual to coordinate the proposed project. Minister Klaassen's mention of his meeting with the President and Vice-president of CIDA and of their interest in supporting the immersion initiative aimed to demonstrate that high-level assurances had been received regarding the likelihood that the project would be financed by CIDA. By stating that the joint Estonian-Canadian EU translation project is 'often cited by Ontario and Estonian officials as a model for project development and implementation', Klaassen provided evidence of Estonia's capacity to manage projects and to cooperate internationally (Appendix A). Finally, Klaassen clearly stated his wish to work 'directly with the TDSB on an immersion-centred project proposal for submission to CIDA' (*ibid.*). This

¹⁴ This and further references to Klaassen (2009) refer to interview data.

called for a response. This and other letters required skill and teamwork to craft. They are part of the project building architecture, the foundation work that documents past accomplishments and the current state of affairs, explains intentions and expectations, and builds a case for the future.

After that first study visit of Estonians to Canada, a small group of five individuals – one university researcher, one deputy headteacher, one local and one national government official, and myself – were tasked with completing the RBM framework. In addition to the already-identified impacts, outcomes and stakeholders, we worked to identify outputs. Outputs focused on immersion programme management, training of stakeholders, curriculum development, teaching materials development, building a research base, creating support structures, providing parent information and managing public relations. Outputs constituted those results that needed to be achieved in order to fulfil the planned outcomes stated above. For example, under the heading of ‘management’ they included (Appendix C):

Have established:

- a project management structure
- a process for determining priorities and a system for reporting on progress
- an Immersion Centre (space, staff, equipment, resource centre)
- work groups

Have in place:

- immersion schools and teachers
- a plan for the creation of the material and intellectual learning environment required in the schools
- a public relations strategy and work plan
- a pre- and in-service training strategy and work plan
- a work plan for the development of resource materials
- a research strategy and work plan
- the project evaluation criteria, strategy, and work plan
- strategies and a work plan to support students with special needs
- a strategy and work plan for the introduction of immersion into kindergarten
- an extra-curricular activities strategy and work plan
- recommendations for the expansion of the immersion model.

We also worked to create indicators for measuring output achievement. The indicators matched to each output. We aimed to create indicators that were specific, measurable, achievable and relevant. However, indicators were not time-bound as timelines would be decided in work plans. The management indicators included (*ibid.*):

- Board of Director's approval of Centre statutes, organisational chart, reports, strategies and/ or work plans
- a signed Memorandum of Understanding (TDSB-EME)
- the size and focus of the project's budget and donor investments
- adopted job descriptions, policies and procedures
- the Immersion Centre is the moral and professional authority in the field
- the extent to which the teaching materials reflect the curriculum goals and guidelines
- the Ministry of Education's approval of immersion-inclusive curriculum
- the number of students at the end of each school year who have achieved the established academic standards
- the extent to which skills obtained through training are applied.

Whereas some indicators such as the first one were easily measurable, others such as the last one were less easily quantifiable. Establishing an indicator such as the last one pertaining to the measurement of 'the extent to which skills obtained through training are applied' meant that project managers could not simply be satisfied with the results of training participants' satisfaction surveys. They had to measure the impact or effect the training was having, for example in the case of teachers, on actual classroom practice. This is a high expectation.

The RBM framework and its component parts (impact, outcomes, outputs indicators, activities, risks) acted as a 'group decisions support' system/model (Huxham, 1996: 143). After meeting numerous immersion programme stakeholders in Canada, who all provided rich input, the complex nature of the task facing Estonia became quickly apparent. The RBM framework was the primary vehicle for synthesising previous knowledge about education in Estonia with new learning from the seminar in Estonia and the visit to Canada, and for creating an Estonian plan for establishing an immersion programme. The RBM framework helped bring order to our understanding of immersion, to new learning, to hopes, to plans, and in addition reduced potential risks vis-à-vis programme development. It helped us avoid cognitive overload or complexity collapse. Thus, the RBM constitutes a form of 'organised complexity', for it deals 'simultaneously with a sizable number of factors which are interrelated into an organic whole' (Weaver, 1948: 536). It also represents an acceptance by those involved in its creation and approval, that a sizable number of interrelated factors are involved in developing immersion programming. Mason (2008: 41) argues that it is a sizable number of factors involving a 'plethora of relevant agencies and structures' including 'teachers, students, parents, and the other community leaders, the state and its education departments, economic structures [...] and so on' that is required for 'generating the momentum' for accomplishing educational change.

Furthermore, not only is the RBM framework a results-based approach, but it is also an 'effects-based approach' (Smith, 2006: 195). An effects-based approach addresses 'complexities by concentrating on their most nonlinear aspects: humans, their institutions, and their actions' (*ibid.*: ix). The RBM framework details stakeholder 'institutions' and emphasises the need

for coordinated action by articulating needed agreements among and planned 'actions' by stakeholders. Also, the framework sought to determine the impact of training on classroom practice. By building in a research component where student achievement and learning materials, among others, are tested, and the immersion programme is analysed for its effectiveness, the RBM allowed for the assessment of the impact of programme investments. Moreover, 'effects-based approaches are ultimately about shaping human perceptions and behavior' (*ibid.*: 283). The RBM framework also reflected a desire to influence people's perceptions and behaviour. It included a substantial parent information and public relations component, whose ultimate goal was to support parents in establishing an association as evidenced by indicator 45 – 'the number of parents in an association of parents for immersion'. The RBM framework sought to reduce the risk of staff turnover by 'including participants in development processes' in order to 'increase their ownership and develop a reluctance to leave behind [their] own brainchild'.

It was less important that the RBM framework be perfect than that it represent an exercise in knowledge building, and that stakeholders agree amongst themselves that this was the vision of what needed to be accomplished, who would be involved, and what needed to be invested into programming. It was also a principal means for communicating that vision. On the one hand the RBM framework offered a certain stable vision of how to move forward, on the other hand, the RBM included a research component and several other elements that would foster reflection and discussion during programme implementation, so that corrective measures could be undertaken when necessary. The programme building exercise was in this sense redolent of action research. Furthermore, enough time and effort had to be invested into building the RBM framework to ensure people understood and supported it. EME senior official Epp Rebane (2009) said that she initially began to wonder why organisers kept honing planned outcomes, outputs and indicators, and seeking Ministry approval of changes, but with hindsight 'this approach was justified as project development had been problem free/immaculate'. However, this also suggests that there are limits to how much time officials can dedicate to an initiative such as this, and that we had come close to reaching that limit.

Robert McConnell travelled to Estonia in the spring of 1999 with a person who would become a key trainer in the programme, Olga Little. We met the Minister of Education on two occasions, and the Minister for Population Affairs. The EME sought to demonstrate to McConnell its commitment and to thank him for the previous visit to Toronto. Project parameters were agreed upon. Relationships were strengthened. Also, McConnell and Little lectured at the Tallinn Pedagogical University and visited schools, building Estonian confidence in these two individuals and their knowledge base, and helping them to learn more about their Estonian partners.

Taking calculated risks

In June 1999 the EME took a leap of faith and hired a project manager, Irene Kāosaar, for the proposed immersion initiative. I participated in the interview which was an indication of the pragmatic and inclusive culture that was developing amongst the project partners. The

financing for this position was provided through the Finnish Embassy with an understanding that the EME would finance the position beginning in January 2000. The TDSB had not yet made a written commitment to submit a proposal to CIDA in support of the planned Estonian immersion initiative. On 1 July 1999, the Estonian project manager started work full-time, as did I. It took months before financing was in place and she could actually be paid. Her husband provided bridge financing for the family, and by extension to the project. I was not paid. As the EME could not provide office space, the Office of the Canadian Embassy in Tallinn did so. The above partners took a leap of faith that the project would be approved and move forward.

Meanwhile, I composed the TDSB proposal for submission to CIDA. The proposal was vetted by the EME and by the TDSB. The Minister of Education, the Minister for Population Affairs and the Chair of the Parliamentary Culture Committee wrote letters in support of the project. These letters aimed to convince CIDA of the urgency behind the proposal. For example, Katrin Saks' (cf. Appendix D) letter argued that the project promised 'to make a major contribution to the integration of young non-Estonians into the mainstream of Estonia's economic, political and cultural life' and of immersion 'having the added benefit of allowing minority students to maintain their mother tongue and cultural identity.' The tone was respectful of the Russian-speaking minority, and highlighted major aspects of Estonian integration policy. This resonated with CIDA's desire to support both good governance and regional stability (Asari, 2009). Minister Saks also stated that the Government had allocated '7.5 million Estonian crowns to assist the city [of Narva] in refitting [their] proposed immersion school.' This was an expression of Estonia's commitment to the project even prior to CIDA's financing decision. However, during an interview in 2009, Saks stated that the Government was unable to convince the city of Narva to establish an immersion programme and had to have the EME take control of and manage a school in Narva in order to launch the programme. This was a case where discussion did not lead to the desired result, and political force had to be used.

The then Minister of Education, Tõnis Lukas (cf. Appendix E), also reinforced the need for the project and submitted a letter of support to reassure CIDA that 'Estonia is able to continue to fund the programme after the Canadian disengagement.' Project sustainability post-CIDA-disengagement was an important criterion for deciding on project financing (Asari, 2009). The Chair of the Parliamentary Committee for Culture Mart Meri (cf. Appendix F) underlined that 'all key stakeholders' have been involved 'in the project development process' and that Estonia 'has allotted significant material resources' to the development of the 'Estonian Ministry of Education's Results Based Management Framework document'. This too provided evidence of Estonian commitment to the project and pointed out that the framework was an Estonian product. This implied that Estonia understood what it wanted to accomplish and how, and that the project was not being driven by TDSB officials who were seeking CIDA financing.

A CIDA official encouraged me to propose a two-year project and then to seek extensions. Having just completed a four-year project with CIDA that included two extension applications, I knew each extension required one year of lobbying to obtain. Not only did this absorb time, it was a stressful process with no guarantee that an extension would be approved. Moreover, the

launching of an immersion programme was a multi-year initiative, and I felt that sustainability could not be achieved in two years. The TDSB submitted a proposal for a four-year project with a budget of CAD 1.8 million. The four-year timeline was accepted; however, CIDA officials asked that the budget be reduced to one million dollars. After intense negotiations Robert McConnell drew the line at 1.4 million saying a lower figure would undermine the TDSB's capacity to meet intended project outcomes. This figure was accepted by CIDA. In this case, making a decision that would allow partners to achieve project goals required the involvement of several people and the capacity to stand firm in negotiating for sufficient resources. It is also noteworthy that the project included monies that would accrue directly to Estonia for the purchase of equipment, renovations, learning materials, etc. Having been a member of the Estonian Ministry of Finance's Foreign Aid Commission, I was aware that many Estonians saw foreign aid as an opportunity for donor countries to provide highly paid employment to their nationals. This could, at times, fuel resentment, hence an effort was made to build additional tangible benefits for Estonia into the budget.

CIDA approved the project in late December 1999. For project implementation to begin, a contribution agreement outlining the responsibilities of CIDA and the TDSB had to be signed. Initially, no senior TDSB official was willing to take on the responsibility of signing the agreement (McConnell, 2010).¹⁵ Over two months after the CIDA financing decision, the 'risk adverse official' who was to sign the contribution agreement directed the TDSB's chief financial officer to sign it instead (*ibid.*). Once the agreement was signed McConnell (*ibid.*) obtained full responsibility for the disbursement of funds, which he considered essential in guaranteeing the efficient operation of the project. This allowed me to immediately hire and pay for services or training in Estonia as needed without having to go through complicated bureaucratic procedures. With Estonian monies, it often took over a month to get a contract signed. Bureaucracy would slow down implementation.

Launching the project

Canadian financing of the project began on 1 March 2000, about two years after the groundwork had begun. The delay had placed serious constraints on the original timetable to launch a pilot programme in September 2000. However, this was mitigated by the fact that two people had worked full-time to lay the groundwork for the project for eight months. A work plan reflecting the RBM framework was submitted to the EME and CIDA within 45 days of the start of the project. Within the first three months significant progress was made in achieving the planned outputs within the RBM. The first TDSB quarterly report to CIDA covering the period of March 1, 2000 – May 31, 2000 contained 14 planned outputs under the headings: development of Immersion Centre; training; development and production of teaching materials; stakeholder involvement; and development of a research base. Table 2.1 is an excerpt from that report showing two outputs, indicators used to measure their achievement and a description of progress made.

¹⁵ This and further references to McConnell (2010) refer to personal communication.

Table 2.1. Two extracts from first quarterly report to CIDA

DEVELOPMENT OF IMMERSION CENTRE

Planned Outputs	Qualitative/Quantitative Indicators	Progress Made in Achieving Indicators During First Quarter
1. – legal and organisational framework in place	<ul style="list-style-type: none"> • Memorandum of Understanding signed between Estonian Ministry of Education and Toronto District School Board • agreement on financial management and reporting as evidenced by reporting templates, letters • Immersion Centre statutes, minister's directive on the establishment of Steering Committee, Steering Committee minutes 	<ul style="list-style-type: none"> • done (See appendix # 1.) • done (See appendix # 2.) • draft documents in place, agreement in principle achieved, but administrative details have delayed final signings

DEVELOPMENT AND PRODUCTION OF TEACHING MATERIALS

Planned Outputs	Qualitative/Quantitative Indicators	Progress Made in Achieving Indicators During First Quarter
1. – foundations for the development of teaching materials in place	<ul style="list-style-type: none"> • agreement between participating schools and the Estonian Ministry of Education on subject breakdown for grades 1-3 • draft grade one curriculum developed and adopted by participating schools • expert evaluation of the grade one immersion curriculum • written agreement on basic criteria for the development of teaching materials • the extent to which gender equity is a consideration in development criteria 	<ul style="list-style-type: none"> • done (See appendix # 8.) • done (See appendix # 9.) • done • done (See appendix # 10.) • agreement on developing teaching materials includes a clause stating that all materials are to be free of gender bias

Although drawing up and agreeing on plans was time-consuming, this was an efficient way of working. The plans were produced in both English and Estonian. The Immersion Centre's steering committee and the EME vetted them. The planning helped staff at the Immersion Centre and its stakeholders to discuss intentions, to make budgetary decisions and provide direction. Moreover, going public with intentions (i.e. planned outputs) may have motivated Immersion Centre staff to achieve them. Thaler and Sunstein (2008: 70) report that people are more likely to actually do what they intended if they state their intentions. Moreover, several Estonian senior officials suggested that systematic planning was a key project success factor (Udde, 2010; Rebane, 2009; Mätlik, 2009¹⁶).

The Immersion Centre continued to operate from the Canadian Embassy. A legal challenge emerged. The Centre could not sign contracts or maintain a bank account, as it was not a legal entity. Turning the Centre into a legal entity was considered too costly. The Ministry's mandate did not allow it to directly manage the Immersion Centre. Instead, the Ministry signed a contract with the Non-Estonians Integration Foundation (Integration Foundation) that assumed legal responsibility for the Centre. The contract included a copy of the Centre's statutes which made no mention of reporting requirements to the Integration Foundation, but instead required the Centre to report to its steering committee. The Immersion Centre's steering committee consisted of the Director of the Integration Foundation, two EME officials, a university professor from Tallinn Pedagogical University, an adviser to the Estonian Minister for Ethnic Affairs, a person managing EU-financed Estonian language projects, and a TDSB representative¹⁷.

The Director of the Integration Foundation did not intervene in the day-to-day management of the Immersion Centre, unless contracts needed to be signed. As the existence of an organisational chart was an RBM success indicator, I asked steering committee members at a meeting in 2001 to draw up a chart showing how the Centre was managed. After several attempts and considerable discussion, committee members were unable to do this. It was decided that the Immersion Centre was an anomaly. It did not operate from a position of power that could be plotted on an organisational chart, but since it was operating successfully, it would be allowed to continue as it was. This played a crucial role in the dynamics of managing the Immersion Centre and coordinating the programme, and perhaps in avoiding what Keltner (2007: 14) refers to as the 'power paradox'. Keltner (2007: 15) suggests that the social skills (negotiation and empathy) that are 'most important to obtaining power and leading effectively are the very skills that deteriorate once we have power.' Never being afforded positional power, the Immersion Centre and its leaders had to work hard to remain attuned to stakeholders' needs and to produce value for them.

The Immersion Centre moved quickly to accomplish planned RBM outputs. School selection was begun immediately. Schools were required to apply for the programme, and meet a series of criteria (cf. Appendix G). In order to enter the competition, a school had to invest considerable effort into planning for and working with several stakeholders in order to prepare its application.

¹⁶ This and further references to Mätlik (2009) refer to interview data.

¹⁷ I assumed this role.

For example, a school needed to have agreements in place with teachers and someone who would manage the programme. Schools were expected to demonstrate that their strategic plans indicated a move towards Estonian-medium education. Consequently, school managers were likely to have developed some understanding of the commitment they were making. The criteria described expectations the school would be asked to meet such as sharing learning with other schools, and as such they served as a informal contract to which the Immersion Centre could later return. To help ensure the programme was supported locally, schools were expected to have the approval of their owner who was usually the local authority. A committee consisting of representatives of several stakeholder groups was established to weigh applications. Although five schools were to be selected, only four schools met the criteria and were chosen.

The early immersion programme was to begin in Grade one and would expand one year at a time through the next Grades. At the time, kindergartens fell under the jurisdiction of the Ministry of Social Affairs and it was decided that despite the fact that this would be a logical place to start, it would take too much time and effort to achieve an agreement or to develop an informed partnership with another ministry. On mutual agreement among participating schools, student selection was to be based primarily on a first come, first served basis. However, in one school that had received a large number of applications, teachers sought to select those students whom they considered to be most able. The Manager of the Immersion Centre and I decided to speak with that headteacher on an individual basis about the apparent major discrepancy between what had been agreed upon with other schools and what his school actually did. It would not change the current situation, but we hoped it would avoid a repetition of it the following year. Also, it became apparent that headteachers who did not speak Estonian as a mother tongue would not always aptly judge the level of Estonian language knowledge of teachers. In the first years of the project, someone from the Immersion Centre spoke with each teacher hired to ensure that her language level was sufficient to teach in immersion.

Conclusion

Estonia's interest in exploring immersion programming options was driven by a need to improve opportunities for the country's native Russian speakers to learn Estonian. The lack of Estonian language knowledge among the country's native speakers of Russian was for them an impediment to obtaining Estonian citizenship and integrating into society at large, potentially contributing to a lack of national stability, security and social cohesion. These potential consequences were considered obstacles to Estonia's future membership in the EU and NATO, both of which the Estonian Government saw as central to decreasing what it perceived as a threat to its national security emanating from Russia. The immersion initiative held the potential of creating considerable value for the nation as a whole.

The Canadian Embassy Office in Tallinn, motivated in part by a need to identify its next major joint Estonian-Canadian initiative, and relying partly on previously built social capital with

Estonian partners, was able to support Estonian, Canadian and other international stakeholders in establishing a high-powered steering committee that began to explore and learn about the immersion option. By placing learning at the centre of discussions, mutually agreed upon learning became a driver in decision-making. Furthermore, by allowing stakeholders a measure of autonomy in directing their own learning, it was possible to give those initially not supportive of immersion the time and access to information needed to change their minds. The learning process included having a wide range of stakeholders listen to and interact with Estonian, Canadian and Finnish experts in immersion. A coherent and common narrative began to develop where experts from several different countries supported immersion education and explained why it was an appropriate option and how it could be developed. Equally importantly the expertise of Estonian academics and practitioners in the field was distilled and recognised. The resulting coherent and common narrative helped stakeholders to believe in immersion as a morally acceptable and viable option for Estonia. Bilingualism was presented as normal and achievable, and as desired by Russian-speaking parents. Once Estonian stakeholders decided to support the early immersion option, travel to Canada and seeing and meeting immersion students and teachers was central in fully convincing several of them that it was a viable option for Estonia.

Meticulous planning was a cornerstone in the development of the Estonian programme. Events such as the first programme seminar and study visit to Canada were goal-oriented, care was taken to ensure rich input, and opportunities and vehicles were provided to draw conclusions and to plan next steps. Using group decision support systems such as letters between senior officials and a results-based management (RBM) framework helped stakeholders to summarise learning and process the complexities associated with programme planning. These documents and the processes for developing them were a key part of the architecture for building the project and programme. They embodied a narrative that captured learning, as well as stakeholder accomplishments, current understandings, intentions and expectations, and built a case for the future. They maintained a focus on precision at the micro and macro levels, and sought to maintain coherence and harmony among their various constituent elements. They also sought to foster their rapid and easy cognitive processing or ‘cognitive fluency’ in their readers (Unkelbach, 2006: 339). However, plans were not rigid in nature as they included mechanisms for research and evaluation and for making adjustments based on emerging needs. Also, the documents were an exercise in knowledge management, and in making information public and planning transparent.

Key to successful planning was the building of relationships. Individuals developed sufficient confidence in one another, their ability to be constructive and to deliver on commitments and plans that they chose to invest considerable financial and human resources into the immersion initiative. Quality in decision-making was tied to the involvement of several stakeholder groups, the sharing of power, and the placement of learning before the interests of any one group. However, at times joint learning and decision-making were insufficient as one city’s participation in the programme could only be achieved through the use of political force with the EME taking control of one municipal school. Yet in this case force was not used with parents as enrolment in the immersion programme remained voluntary.

The capacity to deal with emergent issues remained central to successful programme planning. Key players had to take considerable calculated risks and have the skill and stamina to deal with substantial emerging obstacles to programme development. Having an Immersion Centre lead the planning was an important factor. Placing the Centre in the precarious position of not having legal authority, but being forced to lead programme development from a position of moral authority served as an incentive for Immersion Centre staff to be sensitive to stakeholder needs. Agreements, which were embodied in documents such as the RBM framework, helped provide the Immersion Centre and others with guidance in ensuring that stakeholder needs were taken into account in a balanced manner that did not detract from the agreed upon planned programme development outcomes. Expanding language-learning opportunities to include immersion programming in Estonia required significant knowledge and skills that go beyond the domains of language and content teaching. Although it was essential to understand the implications of immersion programmes for the learner, throughout the programme development stages described in this chapter, considerable expertise and attention to detail was required in the field of management including planning, communication and stakeholder cooperation albeit with a view to planning the development of an immersion programme.

In summary the practices used to develop the Estonian immersion programme included seeking to create value for a wide range stakeholders and fostering stakeholder learning. Care was taken to create among stakeholders a common narrative about immersion programme development. Much effort was invested into the building of relationships. This involved recognising local expertise and creating opportunities for dialogue. A considerable portion of the dialogue was structured using group decision support systems such as a communiqué, a results-based management framework and letters. These facilitated group decision-making and the articulation of intentions and measures to be taken, and constituted acts of power sharing. When consensus could not be reached, key stakeholders were still prepared to take action even if one stakeholder was not in agreement. Nonetheless, the use of moral authority over positional power was the more common practice. Planning was meticulous. It reflected a common understanding that the development of an immersion programme involved a complex set of tasks which operate in a larger complex system where constituent components interact with one another. The meticulous attention to detail and a recognition of the interrelated nature of the constituent elements of plans helped to ensure that they were realistic and that agreed upon intentions could be met. Plans and other documents sought to be concise and easily processed by their readers. An iterative or action research process was built into planning instruments by including a research component and evaluation procedures including success indicators. Taken as a whole these practices can be seen as setting high expectations for the Immersion Centre, the immersion programme and for its stakeholders. The next chapter continues to explore the development of the early and late immersion programmes.

CHAPTER THREE: PROGRAMME IMPLEMENTATION

This chapter discusses the development and implementation of the early and late Estonian-language immersion programmes. More specifically, it describes early immersion programme parameters, and analyses programme achievements and concerns after its first year of operation. The chapter also documents late immersion programme development and describes its parameters. Pressures to expand late immersion programming are explored. Fifth-year results of the late and early immersion programmes are examined by scrutinising the breadth and depth of investments made into programme development. Finally, emergent issues that threatened the stability of the early and late immersion programmes are analysed.

I continue to research some of my own actions and act as an informant whilst empirically grounding my account through references to professional literature, newspaper articles, documents such as plans and reports, and through interview data from decision-makers. These sources also provide information about the development of the immersion programme. Extensive detail is provided as this offers evidence of the constituent elements and lasting nature of those practices (actions, decisions, processes) which contributed to the development of the Estonian immersion programme.

Launch of early immersion programming

In September 2000, four schools launched the early immersion programme in Grade one. Based on an agreement between the Immersion Centre and the schools, all subjects in Grade one are taught in Estonian. Russian Language Arts is introduced in Grade two. In Grade three, in addition to Russian Language Arts, English as a Second Language is introduced. In Grade four, Science is taught in Russian, and in the upper Grades, Physics, Chemistry and Mathematics are also taught in Russian (cf. Table 3.1). The availability and qualifications of existing teachers have led to some exceptions. The programme begins as early total immersion, developing literacy skills first in the L2 (Estonian) and shifts by Grade six to delivering equal portions of the curriculum through Estonian and Russian. Estonian stakeholders chose to adapt the Canadian early total immersion model through the introduction of the L3 (English) in Grade three, as it was strongly felt that parents and the labour market expect school graduates to be proficient in English.

Table 3.1. Language of instruction as a percentage of total instructional time in early immersion

EARLY IMMERSION Grades & hrs of tuition (1 hour = 45 minutes)	Language of instruction as a percentage of total instructional time as agreed upon with schools		
	In Estonian (L2)	In Russian (L1)	In English (L3)
Grade 1 – 20 hrs of tuition per week in total	100	–	
Grade 2 – 23 hrs of tuition per week in total	90	10	
Grade 3 – 25 hrs of tuition per week in total	72	16	12
Grade 4 – 25 hrs of tuition per week in total	64	24	12
Grade 5 – 28 hrs of tuition per week in total	49	39	12
Grade 6 – 30 hrs of tuition per week in total	44	44	12

Most early immersion schools offered two 35-minute preparatory classes per week for two semesters at the kindergarten level. By 2005, preparatory classes were cancelled, as most students entering the programme in Grade one had attended an immersion kindergarten. Programme goals for students were defined as follows:

- Grade-appropriate levels of academic achievement in all subjects taught through Estonian, and in those taught through Russian;
- age-appropriate functional proficiency in listening, speaking, reading and writing in Estonian;
- age-appropriate levels of Russian language fluency in listening, speaking, reading and writing;
- an understanding and appreciation of the cultures associated with the Estonian and Russian language (Immersion Centre, 2001a: 17).

In August 2000, the Immersion Centre moved to its own offices in one of the four programme schools. This helped keep Immersion Centre staff in contact with the realities of implementing and integrating programming in a school. The then Manager of the Immersion Centre, Irene Käosaar, spoke both Russian and Estonian as first languages. Her fluency in Russian was an asset in meetings with the Russian-speaking community. She also spoke English. My knowledge of Russian is very limited. As native speaker of Estonian who had grown up in Canada, my fluency in Estonian facilitated communication with Estonians, whilst my fluency in English facilitated the Centre's communication with foreign partners. The Immersion Centre translated numerous learning materials, sought to purchase high quality interpretation services for events and created multilingual public relations and planning documents. Both Estonian and Canadian project partners paid meticulous attention to detail in all three languages

(Estonian, Russian, English). All public texts were edited by numerous experts. Translations helped bring out weaknesses in the original/source texts which were then subsequently improved. Precision in language use fostered more precision in thought, and in articulating plans, agreements and public relations materials, and in building quality learning materials. This required maintaining a focus on detail while ensuring that the overall picture was not lost.

Immersion Centre staff travelled to schools several times a year. Irene Käosaar and I met with parents. We asked the school's headteacher, the deputy headteacher, and the programme teacher(s) to attend these meetings. When possible, we also included a local or national government official, a parent from a school where immersion had already been introduced and a researcher. We thereby sought to give parents access to multiple perspectives on immersion programming. We quickly learned that it was important to present less information and to instead encourage parents to ask questions, to respond to their concerns in an open and frank manner, and to ask questions of parents. Parents appeared more prepared to listen when they were given greater control by being able to ask more questions and thereby drive a greater part of the meeting agenda. Equally importantly, giving parents a greater voice helped build our understanding of their concerns. Parental concerns centred mostly on the possible negative impact of immersion on L1 development, second language (L2) development, subject learning and on learning for the less academically inclined pupils.

Although parents had placed and kept their children in the programme, many continued to express the same concerns about the programme until their child was in Grade 2, and they had experienced its positive effects. Schools held several parent-school meetings during the first year. New and more specific parental concerns continued to emerge. For example, in the third year of programming, 41% of parents expressed dissatisfaction with their children's writing skills in Russian. These concerns were assuaged when research by Tartu University (Asser *et al.*, 2005: 18) revealed that these immersion students were scoring higher on L1 reading and writing tests than their peers studying through their L1. This reinforces the value of research data in helping parents to better understand their children's academic progress and possibly to better manage their own expectations.

First-year results

In October 2001, the Immersion Centre published its first annual public report in Estonian, Russian and English detailing programme accomplishments after its first academic year of operation (2000-2001). The report begins with a message from the Estonian Prime Minister and a letter from the Minister of Education. Stakeholders who provided quotations specifically for this report included the OSCE Ambassador, the Estonian Minister for Population Affairs, the Finnish Ambassador, the Director of the TDSB, and the Rector of an Estonian teacher training college. All quotations were supportive in nature. Fred Genesee (2001: 14) states that Estonia has 'one of the most exciting and carefully planned programs of immersion in Europe, and indeed, around the world.' Those quoted in the report lend their status to the

public image of the Immersion Centre and programme. These quotations also demonstrate that the Immersion Centre has a positive image among and access to many high-level stakeholders.

The report also gives a voice to parents, a teacher, headteachers, and researchers. A parent, Marina Zhuravljova, says her son 'shifts easily from Russian to Estonian and vice versa and has a positive attitude toward Estonian culture', but expresses concern that 'there is an initial lag in the development of the mother tongue' (Immersion Centre, 2001a: 31). The report allows for this critical feedback, but responds with a footnote that explains that the initial lag in reading and writing skills when compared to children who are studying through their L1 is to be expected and that immersion students catch up with their peers in non-immersion programmes within a few years. A headteacher, Valeri Novikov (2001: 27), helps to draw out the complexity of managing a programme:

Initially, I imagined that I needed only to hire a teacher and the program would run itself. Now I understand that introducing an immersion program is a complex process that requires the involvement of the entire school staff. It also requires co-operation with parents, local government, the Ministry of Education, international partners and other immersion schools.

The Immersion Centre (2001a: 38-41) report summarises conclusions from a research study into the scholastic achievement of immersion students from the four pilot schools. It states that 82-83% of the parents are satisfied with Estonian-language achievement, students are achieving at the same level in Mathematics as students studying only through Russian, but that Nature and Social Studies (Science) results lag behind those in the regular programme. Once again, the Centre reported a weakness, but also made a commitment to address it. Interestingly, 93% of parents tended sometimes or frequently to repeat what had been done in school with their children in Russian. This could be seen as an indication of their concern for their children's academic achievement, and a fear that the programme would not be able to deliver on its promise. In the extreme, Immersion Centre staff found that this could be demotivating for students and had to work with one family to cut back on the practice.

The report (*ibid.*: 23) included 18 major accomplishments that were in line with the original results-based management (RBM) framework including: the expansion of the programme within one year from four schools to seven; a 100% student retention rate; the development of criteria for creating teaching materials; nine workshops delivered by Canadian, Finnish and Estonian trainers; a Grade one textbook written and piloted that integrates all subjects in the curriculum; 450 worksheets of which teachers received class sets; five study visits to Canada and four to Finland; a research base being established; information materials developed; and a successful international conference held.

The report does not mention that the Canadian support project spearheaded arrangements for the delivery of results-based management training by the Ontario Ministry of Training, Colleges and Universities. The weeklong training was delivered to staff members from the Estonian Ministry of Education (EME) and the Office of the Minister for Population Affairs. The template developed

during the training session was used by the Office of the Minister for Population Affairs to plan outcomes, measure results and determine financing needs for Estonia's national integration programme. The EME later used a similar planning model. The Estonian Ministry of Finance cited the EME's new plans as a model to be followed (Mätlik, 2004)¹⁸. Tanel Mätlik (2009) reported that the training received during this session and the learning opportunity provided by the Immersion Centre's results-based planning and reporting culture allowed him to create his own consulting company that is operating to this day. The Immersion Centre created value for several state institutions and individuals working in those institutions that went well beyond its mandate.

Another important achievement is only referred to in the report in passing. A parent, Olga Kuzmitskaya (2001: 32), writes that the programme was not just 'restricted to school. In the summer, the children were taken to camp where they spoke Estonian.' Thus, the programme reached beyond school and facilitated contact and communication with Estonian-speakers. Murtagh (2007: 450) considers this essential, positing that Irish immersion schools need to 'introduce students to Irish-speaking networks that facilitate maintenance and use of Irish after they leave school'.

The Immersion Centre report (2001a: 43-47) also listed six major conclusions: partnerships lead to success; research needs to continue; teachers are central to the success of the programme; teachers need to receive and test teaching materials; there is never enough information about immersion; and senior students, as well as kindergarten pupils, also need immersion. In each case the context or the current state of affairs was explained and plans for the following year were stated. For example, under a heading about teachers being central to the success of the programme it was stated that:

Teachers need to be supported in taking what they have learned in training sessions into the classroom. It has become apparent that teachers need more opportunity to dialogue with and to obtain feedback from professionals in the field, as well as from colleagues (*ibid.*: 45).

Among the measures being proposed was a commitment for trainers to spend more time working with teachers in their classrooms (*ibid.*). The Immersion Centre also committed to assisting schools in improving planning and working with school internal stakeholders (*ibid.*). The final lesson learned listed in the report is about the need for senior students, as well as kindergarten pupils, to be able to partake in immersion programmes (*ibid.*: 47). This was a means for paving the way for the development of these programmes, and for articulating the measures that would be taken to meet these goals such as building on the existing Canadian and Estonian partnership.

¹⁸ Personal communication.

Complexities of achieving results

The report is a reflection of the complexities of establishing an immersion programme. Complexity theory is introduced here to better understand the complexities of developing the Estonian immersion programme, but the theory will be further discussed in chapter ten. Complexity theory explains how various parts of complex systems interact with one another (Larsen-Freeman and Cameron, 2008: 1). Mason (2008: 36) argues that '[c]omplexity theory draws attention to the emergent properties and behaviours that result not only from the essence of the constituent elements, but more importantly, from the connections among them.' The report itself is the embodiment of an effort to bring together and connect various constituent elements (e.g. stakeholders and actions). Another example of the interconnected nature of the emerging immersion programme is Novikov's statement about the importance of stakeholder cooperation (*op. cit.*). In addition, there is a coherent set of messages running throughout the annual report. For example, in his letter the Minister of Education (Lukas, 2001: 5) thanks stakeholders by name and reinforces many of the points being made throughout the report including the need to launch a late immersion programme. In addition, in Lukas' letter, reported results are clearly tied to long-term goals. A narrative is built connecting stakeholders and the past to the present and to the future.

The Immersion Centre report (2001a: 33-34) also gives an overview of the first immersion conference. The conference reflects the stakeholder-inclusive nature of the report. The Secretary General of the EME opened the conference. Speakers included: the Estonian programme manager; Estonian, Canadian and Finnish researchers; the Canadian Ambassador; the head of the EME's General Education Department; the TDSB Project Coordinator; a teacher; a parent; a head teacher; three deputy mayors, and myself. All of the interventions contained expressions of support for the immersion programme (*ibid.*). Davis and Sumara (2006: 147) suggest that high levels of coherence within a complex system permits 'a collective to maintain a focus of purpose/identity'.

The Immersion Centre's first annual report bears witness to many of the other 'conditions of emergence' in complex systems described by Davis and Sumara (2006: 129-152). 'Internal diversity defines the range and contours of possible responses' that are needed in complex systems to deal with both the expected and the unexpected (*ibid.*: 138). The report describes diverse past and future investments and actions. It details management structures, a wide range of investments into many areas such as training and research, and lists many partners and/or stakeholders. These all demonstrate diversity and have the potential of eliciting a range of responses. They also indicate a high level of interrelatedness. Davis and Sumara (*ibid.*: 142-147) speak of 'neighbourhood interactions' to describe how ideas and stakeholders interact. The Immersion Centre report (2001a: 43) refers to partnerships as leading to success, and details several specific measures taken to foster those partnerships such as retreats and written agreements. Tartu University is described as 'the co-ordinator of program-related research' (*ibid.*: 11) and is allowed to present both positive and negative research results (*ibid.*: 39-41). Complex systems allow for both 'negative feedback loops' and 'positive feedback loops' (Davis and Sumara, 2006: 151). By giving a voice to Tartu

University researchers, the Immersion Centre is sharing power with this stakeholder, and as such demonstrates on some level another condition of complex systems, the ‘decentralisation of control’ (*ibid.*: 142). Parent, teacher and headteacher quotations that were solicited expressly for the report also suggest an act of power-sharing as they allow for both negative and positive feedback. The Tartu University example shows that there is room for error or a degree of ‘reproductive instability’ and ‘stability under perturbations’ in the Estonian immersion programme (*ibid.*) as does the Immersion Centre’s (2001a: 45) statement in the report that ‘Russian-language schools have not always been able to adequately assess the level of language knowledge required’ by teachers. The stability is provided through stakeholder statements of confidence, comparisons of Estonian results with international research, and through proposed measures to be taken. In addition, the report (*ibid.*) mentions that ‘teachers will make or break the program’ which can be considered as an admission of ‘the possibility of [...] catastrophic collapse of the system’ (Davis and Sumara, 2006: 151). The Immersion Centre report (*op. cit.*) counter-balanced the possible collapse of programming by describing planned investments: ‘schools will be able to hire part-time assistant teachers for Grade one; trainers will spend more time working with teachers in their classrooms; schools will be assisted in revamping their development plans’.

However, Davis’ and Sumara’s (2006: 129-152) ‘conditions of emergence’ need to be navigated in a knowledgeable way with agents working to influence and build their own contexts. For example, Kanter (2006: 74) cautions that decentralisation or loosening of control should be coupled with increased interactions among stakeholders. Mason reinforces this point (2008: 44) stressing that ‘greater degrees of decentralised control are associated with enhanced neighbourhood interactions.’ Thus, the Immersion Centre’s numerous school visits, training sessions, and meetings with stakeholders point to a culture that left room for all the partners to contribute, while fostering dialogue to reach agreements about how to move forward. The Immersion Centre can be seen as seeking stability balanced by inquiry and growth.

Late immersion: groundwork and launch

The June 2001 conference publicly signalled the start of the effort to establish a late immersion programme. In October 2001, the Immersion Centre’s steering committee instructed the Centre to explore the possibility of establishing a late immersion programme (Immersion Centre, 2001b: 3). The same October, the Estonian Minister of Education met with TDSB representatives to express his Ministry’s interest in cooperating on a late immersion project. Subsequently, in November 2001, the Minister of Education wrote to the Canadian Ambassador to Estonia explaining how a late immersion programme could help address the needs of young Russian-speakers and formally asking Canada for assistance. The letter also stated the express wish to continue the cooperation with CIDA and the TDSB. The Estonian Minister of Foreign Affairs also wrote to the Canadian Ambassador underlining the importance of a late immersion project and stressing that knowledge garnered from this proposed Estonian-Canadian initiative could be used to assist a third country such as Ukraine in establishing an

immersion programme. In addition, the Foreign Minister wrote that he would support the use of Estonian foreign assistance funds for any such future project. Thus, this letter sought not only to demonstrate widespread support for the late immersion project, but aimed to show how financing such a project could contribute to the previously agreed upon Canadian and Estonian commitment to cooperate in the delivery of foreign assistance after the planned termination of CIDA programming in Estonia. The letter sought to serve the needs of Canada and Estonia.

A committee consisting of several TDSB and EME representatives developed a concept paper for a late immersion project. The issue was also raised during the visit to Estonia of senior CIDA official Michael Jay in January 2002. In meetings with Michael Jay, the Secretary General of the EME and the Minister for Population Affairs stressed the strategic importance of establishing a late immersion programme. The Secretary General followed up the meeting with a letter to Michael Jay reiterating his Ministry's interest in cooperating with CIDA and the TDSB in establishing a late immersion programme.

A workgroup was established to plan for programme implementation. The Head of the EME's Planning Department and its Chief Policy Adviser on Integration, as well as the Programme Co-ordinator of the Integration Foundation's Education Programming Centre, the Manager of the Immersion Centre and I developed an RBM framework for late immersion based on the early immersion framework (cf. Appendix H). This framework incorporated plans for working with numerous stakeholders, for the organisation of training, for independent research of student achievement and programme management, for public relations, and for the development of learning materials. The framework sought to support the building of stability and structures, but leave room for stakeholder learning and continued programme development. Numerous EME officials, local government officials, educators and politicians vetted the framework. Further letters of support addressed to Canadian officials came from the President of Estonia and the Mayor of Tallinn.

In late February 2002, a CIDA official met with Mailis Reps, the new Estonian Minister of Education. Shortly thereafter she wrote a letter of support for the proposed late immersion project and pledged her assistance in obtaining the requisite financing. The CIDA official also attended a roundtable at the EME where six ministry officials including the Secretary General, and the Director of the Integration Foundation discussed the proposed late immersion project and reinforced their commitment to it. This level of support and organisation was considered highly impressive by the CIDA official (Asari, 2009). This roundtable was followed by a visit to Canada by the above-mentioned key developers of the RBM framework. The visit focused on studying the implications of establishing a late immersion programme. Learning garnered during each day of the visit was distilled and discussed. An entire day of the visit was devoted to honing the proposal and the RBM framework. Minister Reps was provided with a one-page memo regarding the visit (Soll, 2002). In the interest of fostering ease of understanding, information in the memo was broken into four categories: primary conclusions; primary results; next steps/ requests for you; main facts. Footnotes were used to reference previous meetings and agreements. The final proposal was vetted by key stakeholders before submission to CIDA. Financing was provided within months.

The groundwork for the launching of the late immersion programme was a systematic process that involved: building in learning opportunities for stakeholders prior to and during project implementation; having key stakeholders make joint conclusions and decisions; building connections between the past, the proposed project and the future; documenting decisions and support through concise memos, letters and minutes that fostered their readers' 'cognitive fluency' (Unkelbach, 2006: 339); planning in a results and effects-based manner; seeking ways to mitigate risks; and paying attention to detail and being precise.

In order to join the late immersion programme, schools were required to compete based on the same criteria used to select early immersion schools (cf. Appendix G). Nine schools applied and five were chosen in February 2003 by a committee representing key stakeholders. Within a few months one of the five schools was withdrawn from the programme as its headteacher was not prepared to have students study more than a few subjects through the medium of Estonian. The late immersion programme was planned to begin in Grade six, which was considered a preparatory year. Based on mutual agreement among participating schools, student selection was to be decided primarily on a first come, first served basis and a minimum C+ average in Grade five Estonian Language Arts (Estonian as a second language). The C+ criterion introduced an element of elitism into the programme, but it was based on the premise that prior achievement is a major indicator of future success (Hattie, 2008: 41-42). In Grade six Science, Civics, Handicrafts and Art were to be taught through Estonian. In Grades seven and eight, all subjects, with the exception of Russian and the L3 (English), were to be taught in Estonian. In Grade nine, 60% of the curriculum was to be delivered through Estonian and the remainder through Russian with the exception of English Language Arts (cf. Table 3.2). This late total immersion programme modelled in large part what had been suggested by Canadian educators, but was adapted to allow for a 'softer' start in Grade six as this was thought by Estonian planners and implementers to better prepare students for total immersion. The continued teaching in Grades seven and eight of Russian and English reflects the importance placed on these languages by stakeholders.

Table 3.2. Language of instruction as a percentage of total instructional time in late immersion

LATE IMMERSION Grades & hrs of tuition (1 hour = 45 minutes)	Language of instruction as a percentage of total instructional time as agreed upon with schools		
	In Estonian (L2)	In Russian (L1)	In English (L3)
Grade 6 – 30 hrs of tuition per week in total	33	57	10
Grade 7 – 30 hrs of tuition per week in total	76	14	10
Grade 8 – 32 hrs of tuition per week in total	76	14	10
Grade 9 – 34 hrs of tuition per week in total	60	30	10

The Immersion Centre expanded its staff to ten people. The early, late and kindergarten programme were assigned their own managers. Delegations from the newly selected late immersion schools travelled to Canada. Each school sent a teacher, deputy headteacher and headteacher. A journalist and a teacher trainer were also included in the delegation. This was an act of ‘coherence making’ (Fullan, 2001: 107-119), and an attempt to build redundancy or resilience into the system by ensuring that several stakeholder groups were having the same opportunity to learn about late immersion. After each day of meetings with a wide range of Canadian late immersion stakeholders, the Estonian delegation met to distil the knowledge the group felt it had gained during the day. The final working day of the visit was dedicated to summarising learning and, above all for making agreements about programme management and plans for cooperation. Once back in Estonia, training sessions were organised for schools in change management, planning for the introduction of programming, and in immersion methodology. Learning materials and networking opportunities were created.

Preparations for expansion

The development of the late immersion programme in four pilot schools coincided with preparations to rapidly expand the late immersion programme to an additional 15 schools. As a result of considerable lobbying on the part of the Immersion Centre and its stakeholders, the expansion was financed by both the Estonian Ministry of Education and Research (former EME), and by the EU’s Phare programme. The joint Estonian-EU project spanned 2004 and 2005. It included the following planned outcomes:

Late immersion programme launched in 15 additional Russian-medium schools:

- 80 subject teachers trained (40 days) in immersion-specific methodology
- 15 deputy headteachers and 15 school inspectors trained (10 days) in immersion methodology
- 15 headteachers, 10 local government officials and 5 EME officials trained in the (10 days) programme management
- 15 school teams (6 people in each) trained (20 days) in strategic planning
- The libraries of 20 late immersion schools equipped with the requisite Estonian-language materials to support immersion programme
- The 20 late immersion schools equipped with the requisite technical equipment
- 1,000 worksheets for Grades 6-9 (Phare, 2003: 8).

A private training company was contracted to organise and deliver all the above outcomes. The Immersion Centre wished training sessions to be integrated and to create a coherent narrative whilst moving toward tangible goals such as the development of a plan for the implementation of the late immersion programme in each school. It required considerable cooperation with the

training company's managers and its trainers to obtain the desired results. In addition, EU Phare projects required substantial paperwork and their success criteria appeared to be more tied to the number of people trained on a given day and topic than on the quality of the training. The Integration Foundation that had signed a contract with the EME to assume authority for the Immersion Centre was heavily focused on procedures and the type of results that would ensure problem-free EU financing. Tension between the Integration Foundation and the Immersion Centre began to grow. The Integration Foundation was a project-based organisation that saw itself more in the role of administrators whilst the Immersion Centre considered itself an organisation that was building expertise in the field and that supported schools in developing programming. A 'PricewaterhouseCoopers' report (2005: 5) that analysed the work of the Immersion Centre stated that 'there are differences in understanding of goals, assignment (mandate) and responsibilities between the way the Integration Foundation and the Immersion Centre approach the organisation – the Integration Foundation is project-based and the Immersion Centre is programme-based.' Although the Integration Foundation helped to manage the Phare project, tensions between the organisations continued to grow. The Director of the Integration Foundation died. The Foundation's new managers sought to reduce the Immersion Centre's autonomy. Immersion Centre staff spent hours discussing the rising tensions. One Immersion Centre staff member quoted the Deputy Director of the Integration Foundation as saying that the Immersion Centre was her primary problem.

Fifth-year results

By 2005, despite concurrently building a pilot late immersion programme and expanding that programme to an additional 15 schools, the Immersion Centre, working in concert with its stakeholders, reported on an extensive list of accomplishments. The Immersion Centre's (2005: 30-34) fifth year report states that a total of 17 kindergartens and 31 schools had joined the programme and that the programme had become part of the mainstream education system. The report (*ibid.*) went on to say that a research base was in place that focused on student achievement, parents' opinions, and management practices and that demonstrated that immersion student achievement was consistent with international results. The report (*ibid.*) also stated that 2,250 worksheets had been created for late immersion together with numerous books and other materials for early immersion. Additional achievements included: a total of 55,000 person hours of professional development for 900 people (teachers, school administrators, parents, university lecturers, local and national education officials); 1,545 minutes of radio and TV airtime devoted to the immersion programme including a 10-part reality TV programme about immersion students; extra financing for the programme from eight local governments; the President's Education Award for 2004; and, a handbook/compendium for immersion teachers and administrators (*ibid.*). The accomplishments described above are considerable. Following the pattern established in the first annual report, the 2005 report included quotations from high status individuals such as the Estonian Prime Minister, other Government ministers, and a wealthy business leader. Teachers, parents, trainers and other stakeholders were asked to contribute quotations to the report which

were all included in the report thus giving them a voice in the same vein as in the first report. The report recognised achievements, and individuals who had contributed to them. It summarised research into student achievement and programme management, and it identified challenges and explained needed changes.

Depth and breadth of investments

The results outlined above in the 2005 Immersion Centre report provided an indication of the breadth of investments required to develop the immersion programme. These included investments into: learning materials development; communications; research; international partnerships; and, training for teachers, school administrators, parents, university lecturers, local and national education officials. In addition to the breadth of investments, however, considerable depth of understanding, knowledge and skills was required to achieve most of the above results. This included an in-depth understanding of best practice in a variety of fields directly related to the above such as research or learning materials development, but also in-depth understanding of many other areas such as knowledge management, stakeholder relations, public relations, and results and effects-based management. Moreover, coordinating programme development required a capacity to synthesise, to operate on both the macro and micro levels, and to understand how various aspects of programme development are linked with and impact on one another. In addition to simultaneously maintaining a system-wide view while working on some particular aspect of programming, it required having the capacity to draw links across time: to draw on the past, while operating in the present, while looking toward building a common future.

It was also necessary to take into account the social constructivist nature of meaning making, which often felt like an act of ‘bargaining for reality’ (Rosen, 1984: 1). Part of that bargaining process required stakeholders to actively work together to gain the knowledge needed from each other and from external sources to make sound decisions. Concomitantly, it required that the Immersion Centre and its stakeholders operate from a position of grounded professional confidence. Grounded professional confidence may be summed up as knowing when one’s thinking and skills are sound enough to make one’s own decisions, and taking action thereon when appropriate, whilst maintaining a high level of professional standards and advancing one’s own learning. This involved maintaining a balance between building structure and stability, while seeking new knowledge and adjusting one’s plans as needed. Finally, the Immersion Centre needed to be prepared to expect and calmly deal with the unexpected.

The in-depth nature of some of the investments required between 2000-2005 to establish the Estonian immersion programme are detailed in the remainder of this chapter. Development of learning materials, training programmes and a strategic plan will be discussed as will some emergent challenges that threatened the existence of the programme.

Learning materials development

Prior to producing the textbooks for Grades one-three, criteria were created by the Immersion Centre to guide learning materials development (cf. Appendix I). Teachers who would themselves be using the new textbooks were co-opted as authors. They had never written a textbook. They received bespoke training; however, we were unsure of what that training should include. At the same time, an immersion-specific curriculum was developed which provided guidance to the authors regarding content. As chapters of a textbook were drafted, these were reviewed by Immersion Centre staff together with the authors. Prior to publication, photocopies of the textbooks were used by the first cohort of immersion students for an entire academic year. Teachers using the photocopied textbooks were asked to provide feedback according to a detailed grid. Teacher feedback was incorporated into the draft textbooks. The drafts were reviewed by an expert at Tallinn Pedagogical University. The expert's feedback was taken into account. The draft textbooks were presented to an EME committee responsible for designating whether books met the Ministry's requirements. Feedback from that committee was also incorporated into the textbooks. All stages added value.

However, a rigorous review of the textbooks against criteria for learning materials development showed there was still room for improvement. For example, although it was agreed that school children should be able to recognise themselves in these materials, it took an extra effort to ensure that Russian names, holidays and symbols were included. Some authors resisted portraying families that had experienced divorce. Textbooks were changed to better reflect diversity actually present in society and to bring in some real life problems such as a student adjusting to a parent finding a new partner.

Authors also resisted including self and peer-assessment tools, and required support in incorporating such tools. Most questions on readings were fact-based. For example, a story about the North Wind that caused damage in the spring was initially followed only by fact-based questions. After review, questions were included making connections with the students' lives and calling for critical thinking such as: 'Have you ever hurt anyone without meaning to do so? What happened? What would you do differently next time?' (Kebbinau *et al.*, 2003: 45). Also, it was necessary to provide additional language scaffolding. Greater clarity was brought to some texts, many sentences were shortened, and sub-headings, graphic organisers and glossaries were added.

Illustrations were also an issue of concern. Despite having written guidelines to the contrary artists drew each grandmother with horn-rimmed glasses, with her hair in a bun and often sitting in a rocking chair. There were women in their fifties in the review committees that were grandmothers, but could not initially see stereotyping of grandmothers as an issue needing to be addressed. All women were depicted as shorter than men, yet there were several tall women in one group reviewing the materials. When asked about their experience as tall schoolgirls, they all expressed memories of discomfort. Still, they were unconsciously prepared to perpetuate the myth about all men being taller than all women until they were helped to see the need for change. Even having

seen the need, the additional work involved in making changes acted as a barrier. Simple solutions had to be proposed such as cutting out a piece of a very long neck to shorten a man. Further, an illustrator was asked to include in a textbook a child in a wheelchair. The original drawing showed the child sitting rather limp and despondent off to the side from a group of cheery children sitting in a circle. When this was pointed out to the artist she initially refused to accept the analysis. A solution was proposed to leave the wheelchair in, but remove the child sitting in it, leaving the impression that one of the children sitting in the circle was the owner of that chair. The materials revealed the authors' and illustrators' own current ideals, understandings and stereotypes.

A programme of this nature required a considerable change in people's perceptions, and this took time, and a systematic effort to achieve. After several years, as we all learned more, all the immersion textbooks were partly rewritten. This involved two-day, over-night retreats where key criteria were displayed and textbooks reviewed against them. At the retreat a group of six people, who included three teachers and two experts from the Immersion Centre and myself, analysed a given textbook. Participants had to arrive well prepared, as they were expected not only to provide analysis, but also to suggest new text to replace anything they wished to see changed or removed. Budgetary restrictions had to be taken into account when suggesting changes to artwork.

Training

Delivering high quality training was a complex process involving several stakeholders. Suitable 'off-the-shelf' products were in short supply. The Immersion Centre identified university staff and private companies that might be potential training partners. The knowledge base of potential trainers was, from the Immersion Centre's perspective, insufficient. For example, potential trainers might have been well versed in certain aspects of immersion research, but would know much less about how to apply lessons from research in the classroom. Immersion Centre staff learned that having researchers lecture to teachers was not as effective as organising active-learning experiences that integrated short theoretical and research-based explanations. This required each active-learning exercise to be followed by a short explanation of related theory and research evidence. It required grounded professional confidence on the part of Immersion Centre staff to support potential trainers in adjusting their practices.

Initially, many of the trainers were brought in from Canada. The Canadian trainers/consultants were all volunteers. Robert McConnell, Irene Käosaar and I usually invited people to work with us with whom at least one of us had previously worked or based on recommendations from trusted colleagues. The selection process involved identifying people who had considerable expertise, listened carefully and who took the time to engage with us in deeper order 'exploratory talk' (Barnes, 2008: 1-15). We usually rejected those who created 'asymmetry' (Mercer and Dawes, 2008: 56) in dialogue, leaving us feeling that we were not listened to. Considerable time was invested in joint planning with potential trainers. Although no one planning formula could be fully applied to preparing the interventions of each trainer/consultant, building understanding of

Estonian context and needs, and agreeing upon intended outcomes was key. Regular dialogue, including careful listening, was central to making volunteer trainers/consultants feel comfortable and secure in what was for them an unfamiliar country and city. Safety and other personal concerns were potential 'wild cards' that could impact on a trainer's/consultant's ability or willingness to work with the Immersion Centre. After training/consulting, time was taken to debrief each day, often in the evening over dinner. Opportunities were provided for tourism. Maureen Edgar (2011)¹⁹, former Ontario Acting Assistant Deputy Minister of Training, Colleges and Universities, who advised Immersion Centre staff on site in Estonia on several occasions, reported that it was the 'meticulous attention to detail' that made her work with the Immersion Centre 'unique and meaningful'. 'From the clear articulation of the assignment's objectives, to the careful consideration of how best to bridge any linguistic and cultural challenges I might experience, to the rich and varied opportunities to work meaningfully with both staff and stakeholders, to the beautiful and safe housing and the wonderful tourism opportunities, I continually felt that my services and skills were utilized well and my contribution deeply valued' (*ibid.*). The Immersion Centre sought to develop long-term relationships with those trainers/consultants who were considered particularly effective, and whose skills were required by the Centre.

The fact that foreign trainers were volunteers probably led us to be more attentive to their needs and demonstrate our appreciation more than might have been the case if they had been paid. Letters detailing the contribution of each trainer/consultant were always sent to senior officials in Canada such as a director, deputy minister, or minister and copied to the trainer's/consultant's direct manager and to the trainer/consultant. These letters were always signed by the Secretary General of the EME or a Government Minister. Feeling that these volunteer trainers always had the power to withdraw their services, we may have considered ourselves as having less power than they did. Keltner *et al.* (2000: 10) states that 'low power individuals attend to others more carefully.' If this is the case, it also brought us greater rewards. Volunteer trainers and consultants, who in their professional life usually had a number of different roles also had a potentially motivating opportunity to share their professional experience with people who were willing and active listeners.

The Immersion Centre organised a wide range of professional development opportunities. In addition to training for teachers and deputy headteachers in methodology other training topics were offered. These included teambuilding, recognising achievement, lesson observations, results-based planning, and change management. Training sought to build immersion programme sustainability through knowledge-building, empowerment and the intrinsic motivation of programme officials, educators and students. I believe we aimed intuitively to build a culture of 'authenticity', where training participants were learning about themselves and their situation whilst developing greater 'autonomy and agency' (Kohonen, 2009: 13 referring to Kaikkonen, 2000).

For example, a two-day workshop held in 2003 aimed to support schools in renewing their strategic plans. Intended learning outcomes were made clear to participants (cf. Table 3.3). As schools were required in the near future to present these plans to local authorities, work on them

¹⁹ Personal communication.

could be considered a meaningful and authentic training activity. Renewed strategic plans and increased skill in managing the renewal process had the potential of fostering autonomy and agency in schools and among their stakeholders in planning for immersion. Each of the four late immersion schools chose six-eight people to participate in the workshop. The Immersion Centre provided structure by asking for the participation of the headteacher, the deputy headteacher responsible for immersion, the deputy responsible for the Russian-language programme, teachers and a parent. Schools were invited to include additional influential members of staff or other stakeholders. One school involved its psychologist. In addition, a local government official responsible for education was invited to attend from each of the pilot schools' municipalities. Involving some of each school's internal and external stakeholders was a way of giving those stakeholders a voice, facilitating joint planning, and helping schools and their stakeholders to better understand their interdependence. All the early immersion programme headteachers were invited to attend in order to create an opportunity for the late immersion headteachers to draw on their experience, and to foster networking between the two programmes.

Table 3.3. Excerpts from 2003 programme for workshop on managing changes associated with the introduction of late immersion

Primary Goal

To assist school teams:

- in introducing and supporting changes required for a successful integration of a late immersion program.

Secondary Goals

To help school teams to:

- gain an increased understanding of the characteristics of an effective immersion school as a vehicle of change;
- understand the key elements of a change process;
- agree on two areas in which steps need to be taken to support the successful implementation of the immersion program;
- agree on a communications strategy for giving staff feedback on the input they provided;
- agree on what will be the next steps in moving the change forward.

To help the Immersion Centre to:

- understand how it can better support schools in the change process.

Long-term Goals for Achievement by 2005

- to have renewed school strategic plans approved by staff, the community and the local government.

Two weeks prior to the workshop, each of the four schools was given three large posters to place in their staffrooms. Staff members were asked to answer on the posters the following three questions that were posed in both Russian and Estonian:

1. What do we do regularly in our school that we are proud of?
2. What do we no longer do in our school, because it did not lead to the expected results?
3. What don't we do in our school that we could do? (Immersion Centre, 2003)

The questions were a way of encouraging schools to think about needed changes, failed change initiatives and their hopes for the future. In addition, the questions aimed to help workshop participants to see other people's perspectives and to connect these with the workshop. Also, the questions were meant to facilitate authentic dialogue in each school while giving teachers a greater voice. During the workshop, schools were asked to analyse what the staff responses said about their school, their future plans and next steps? In order to encourage continued dialogue about the issues raised, the workshop included a session on how school staff would be given feedback on the workshop. The workshop participants worked through the correlates for effective schools (Lezotte, 1991) and stages in change management (Kotter, 1996) as reference points for planning. Visioning work was undertaken and next steps were planned.

Discussions were open and frank, and in that sense authentic. One headteacher kept stating that his city was a special case and that much of what we were discussing was not applicable. I recall mirroring back my perception that his focus was on building a case for failure, as opposed to building programming despite the challenges. I encouraged him and his team to focus more on what could be done, as opposed to what could not be done. This headteacher had a reputation for being authoritarian. This workshop encouraged all the participants to share. We did the same when attending meetings at this headteacher's school. Staff in his school began to use their agency more actively to express their dissatisfaction and make proposals for change. I later witnessed this at a meeting at the school. Increased agency at that school helped expose problems. Rising tensions about leadership led a deputy headteacher to resign. The headteacher continued to use his agency in a negative way 'to undermine, shrink and reduce' (Kohonen, 2009: 13) other people's developing agency, and eventually to end the late immersion programme claiming it was unsuccessful and could not work in his region. Shortly thereafter, when this headteacher retired, the new headteacher re-launched the late immersion programme and established an early immersion programme as well. Thus, for one school the authentic dialogue and agency helped bring out problems, but not resolve them without the departure of a key player. However, for others the workshop on renewing strategic plans had a more immediate constructive impact. One deputy headteacher interviewed at one of the four schools in the case studies referred to this workshop as 'exceptionally useful' and said she regretted that a follow-up workshop on the same theme had not been organised.

Strategic planning

The creation of the Immersion Centre's strategic plan for 2004-2008 (Appendix J) is another example of the in-depth investments required to foster authentic dialogue, stakeholder agency and cooperation. It is also an example of a one-page document that supported cognitive fluency in its readers and acted as a results and effects-based planning mechanism for group decision-making. Inconsistencies are easier to discover within a short document. In addition, a short concise plan allows stakeholders to see what is expected of them at a glance. Moreover, it is easier to link work plans and budgets to such a strategic plan.

The strategic plan included a quotation from the Estonian Minister of Education and Research stating that '[i]mmersion helps ensure the acquisition of languages and a wide knowledge base. It also fosters open-mindedness. Initial program achievements are most promising. Congratulations to participating schools and to the Centre!' The Minister's quotation is an expression of support: the Minister can be considered as lending his status to the Immersion Centre and programme. The quotation also points to immersion as a means for language and content learning, as opposed to simply language learning. This is in harmony with what had been a key message of the Immersion Centre. The Minister recognises both the schools and the Centre for their good work. By stating that 'initial program achievements are promising', the Minister implies that more work is to be done so that later programme achievements will also be considered 'most promising'. The Minister's quotation is followed by the Immersion Centre's mandate. This provides a framework for the Centre's operations, and shows and legitimises the scope of the Immersion Centre's activities.

The plan itself reflects an understanding by those stakeholders involved in its development that there is a need: for adequate financing by having the Immersion Centre lay the groundwork: for developing a funding model; for turning strategies into plans through cooperation with stakeholders and the development of a plan for managing the programme after its expansion; for building in learning loops through research and evaluation; and, for continued learning through international partners. The plan recognises that stakeholder commitment, planning and implementation are an integrated whole, and that immersion programming is part of a complex system that needs to rely on the expertise of many. It seeks to foster both 'internal diversity' and 'redundancy' (Davis and Sumara, 2006: 137-141).

In addition to the value of having a strategic plan, the process used to create it can also be considered important as it helped build stakeholder commitment to the plan's goals and strategies. It built on long-term partnerships and sought to include new individuals. The Ontario Ministry of Training Colleges and Universities provided two experienced facilitators, Penny Lawler and Maureen Edgar, who had a proven record of successful work in Estonia and/or Latvia.

The participants for the strategic planning exercise were chosen based on their knowledge base, moral authority, the power afforded by their position, and based on the Immersion Centre's desire to ensure that as many stakeholder groups were represented as possible. It was felt that this would help to better ground the strategic plan in reality and to ensure greater support for achieving its goals. The participants included: national and local politicians; EME, Integration Foundation and State Examination and Qualification Centre officials; Immersion Centre staff; headteachers; and researchers. I was also part of the group. On the fifth day of the workshop, Toivo Maimets, the Estonian Minister of Education and Research joined the group. The fact that the plan had to be presented to the Minister helped raise the status of the whole initiative, and motivate at least some of the participants to work hard. The strategic planning exercise was held in Canada, which helped increase the possibility that participants would attend for the entire five days and that cell phone use could be reduced. Wireless Internet access was not provided so as to reduce the possibility of people working on their emails. Indrek Raudne (2009)²⁰, a Member of Parliament, said that this was the first time he 'had ever spent five days as an MP concentrating on any one issue' and that he saw the value of being able to delve deeper into one topic.

For the first four days, the majority of the time was spent in analysing the Estonian situation. In particular, we worked to identify stakeholders and answer the following five questions regarding primary stakeholders:

- What does each stakeholder group want or expect from the Immersion Centre?
- How does the stakeholder group assess the Immersion Centre's performance?
- From the stakeholder's perspective, how well is the Immersion Centre doing?
- How would the stakeholder group like to work with the Immersion Centre?
- What does the Immersion Centre need from that stakeholder group to be successful?

As strategic issues were drawn out, the related goals and strategies were developed. During the third and fourth days, Lawler and Edgar with Immersion Centre staff and myself, worked into the evening to further articulate these goals and strategies. The work completed in Toronto in English was sent to Estonia for translation into Estonian and for the input of Immersion Centre staff. A seven-hour time difference worked to our advantage, as we in Toronto began our workday as our colleagues in Estonia were ending theirs. Each morning, Käsosaar and I would review the translations and input from Estonia, and revise the translation prior to presenting it to the group. The group would then hone the text negotiating the meaning of each phrase. This rigorous process produced a better quality strategic plan and helped ensure that it was supported by Immersion centre staff.

On the fifth day of the workshop, the strategic plan was presented to Minister Maimets and approved by all present. Moreover, at that meeting with the Minister, it was concluded that:

- immersion students cost more to educate than regular programme students;

²⁰ This and further references to Raudne (2009) refer to interview data.

- the EME and the Immersion Centre need to develop a joint plan for immersion programme development;
- immersion must become part of the national curriculum;
- an Immersion Centre representative should be included in the Ministry working committee on the development of *per capita* financing formulas for various student groups (Immersion Centre, 2004: 1).

It was also decided that the plan would be honed, and that it would be presented to the Immersion Centre's and the Integration Foundation's steering committees for approval. Both the conclusions and the decision to have the plan presented to two steering committees indicated an understanding of the need to integrate the Immersion Centre's strategic plan with existing structures, policies and planning vehicles. The participants had created a realistic plan that had the support of those stakeholders attending the workshop and would garner the support of others. This is evidenced by the fact that immersion students would eventually be financed at a higher rate *per capita* than non-immersion students, and that immersion was included in the national curriculum (Käosaar, 2009). Further, Raudne would help to found the Association of Immersion Programme Parents and help it to access public finances. In 2008, the Immersion Centre would join the CLIL Cascade Network and run an international conference in Tallinn (Beardsmore *et al.*, 2008) attended by 400 people of whom approximately half were from abroad.

Emergent issues

Finally, no matter how well planned or how much support was garnered for the immersion programme, unexpected challenges emerged. The most significant of these occurred in December 2005 when the Estonian Ministry of Education and Research (EMER) was set to renew the contract between the Ministry and the Integration Foundation regarding the management of the Immersion Centre. Immersion Centre managers were aware that Mailis Reps, Minister of Education and Research, despite having written to Canadian officials asking for financial support for a late immersion initiative, did not strongly endorse late immersion (Reps, 2005: 8). Immersion Centre staff were also aware that one of the Minister's advisers had been critical of immersion. The Immersion Centre expected that it might have to fight hard to maintain or increase its budget. Negotiations were moving remarkably slowly. Just prior to Christmas 2005, I recall the Integration Foundation official, who was negotiating with the Assistant Minister of Education and Research, tell me that he had asked the Assistant Minister if he was aware of the fact that the Immersion Centre staff members were about to leave for Christmas holidays without knowing whether they would have a job to return to. I was told that the response was simply: 'Yes, I know that.' No reassurances were offered. The Immersion Centre contacted several journalists and worked to place good news stories about the immersion programme in newspapers. A full-page article appeared in the Russian-language version of the daily newspaper *Postimees*.

At the end of 2005, the Immersion Centre sent out an email to schools and several other stakeholders saying that it was ceasing programme development work as of 1 January 2006. The message expressed the hope that a new contract would be signed between the Integration Foundation and the EMER, and that the Centre would be able to continue its work (Käosaar, 2010). Whoever was making the decisions regarding immersion, the Ministry had not considered that it had signed a Memorandum of Understanding with its Canadian partner committing itself to establishing a permanent Immersion Centre. Moreover, there seemed to be little awareness that a major EU-financed project to build Estonia's capacity to offer late immersion programming was under implementation. Cancelling financing to the Immersion Centre prior to the completion of the EU-financed project managed by the Centre, a project which also sought to build the Immersion Centre's management capacity, prior to seeing the project's benefits or without having any research data to support the Centre's closure would have placed the Estonian Government in a difficult position with the European Commission. The Ministry's actions did not appear to be well reasoned or well planned.

It also appears that the Ministry was trying to use power as opposed to dialogue to achieve its unstated goals. Power is commonly seen as a use of 'cash, votes, and muscle' (Keltner, 2007: 15). What these ministry officials did not take into account is that power can also be defined 'as one's capacity to alter another person's condition or state of mind' and that 'subordinates can form powerful alliances and constrain the actions of those in power' (*ibid.*: 16). In this case, many immersion stakeholders chose not to act as subordinates, seeking instead to limit the EMER's power over this situation. For example, Paul-Eerik Rummo, Minister for Population Affairs lobbied for the Immersion Centre and programme. Referring to this incident in an email interview Rummo (2009) wrote: 'In summary, the Education Minister's ambitions were poorly justified and it was possible to overcome them. I spoke with all those people who were involved and could bring influence to bear and explained the pointlessness and danger of the proposed change.'

A more grassroots response to the Ministry's actions was sparked by the Immersion Centre's email about its future. On 4 January 2006 an article by Aleksei Günter appeared in the daily newspaper *Postimees* with the headline 'Immersion threatened with disruption'. The headline implies that the Immersion Centre and the immersion programme are seen as one and the same. The article states that the Immersion Centre had ceased all developmental work and that Käosaar says 'the future of the Centre is unclear.' Headteacher Tatjana Lüter is quoted as saying that it is 'unclear how a programme that the Minister herself highly lauded last autumn, has now stopped.' It is noteworthy that the programme and the Centre are here again being conflated. Lüter builds a case for immersion by clarifying that her school joined the immersion programme to help students prepare for the Government-mandated shift to studying primarily through the medium of Estonian at the high school level. She also states that she will be writing a joint letter with the other headteachers of Russian-language schools to the Minister. Günter reports that the Assistant Minister of Education and Research has stated that the EMER does not intend to close the Centre, and that it is waiting for the Centre's report before signing a new contract. This argument is in conflict with previous agreements. The Immersion Centre presented its quarterly and annual

reports to its steering committee and to the Ministry for approval 45 days after each quarter. The Ministry had made no request to the Immersion Centre to change this procedure. Moreover, it would not be considered common policy, motivating or a good staff retention strategy to leave people working in a government agency without a salary and with no reassurances about their future at the start of a new fiscal year.

On 5 January 2006, the *Postimees* published another article with the headline ‘Russian students demand the continuation of language immersion’. This is further evidence that immersion programme stakeholders had become autonomous agents who were prepared to defend their stake in the programme. The Immersion Centre is again so thoroughly associated with the programme that a distinction is not being made between the two. This implies that stakeholders see the Immersion Centre’s role as vital and synonymous with immersion programming. The article states that the Students’ Assembly, which unites over 50 Russian-language schools, sent a letter to the Prime Minister, the Minister of Education and Research, and the Minister for Population Affairs. Aarevik Tamerlan, the Assembly’s Secretary is quoted as stating: ‘it would be harder to do a greater disservice to Estonian education.’ Tamerlan declares that Russian-speaking youth will go into the streets ‘to protect their constitutional right to learn Estonian in school to a proper level’. The article goes on to quote an EMER press release stating: ‘We expect to sign an agreement with the Immersion Centre in the near future.’ This is revealing in that if the newspaper report is precise, the Ministry’s statement accords the Immersion Centre greater power than it actually had, as any agreement would legally speaking have to be signed between the Ministry and the Integration Foundation. The contract was signed soon thereafter and the Immersion Centre received a budget increase.

The Minister of Education and Research was a member of the Centre Party. Much of the Party’s support comes from Russian-speaking voters (Pettai, 2007: 947). One interpretation is that this seeming lack of support for immersion was a conscious Centre Party strategy aimed at hampering language learning and integration so that the Party could better hold onto its powerbase by keeping Russian-speakers monolingual. However, several people I interviewed felt the incident was not part of a well thought through strategy. Many of the Ministry’s actions described above bear witness to this. Tõnis Lukas (2009), the Minister of Education and Research said that ‘the programme was by then so well rooted in the system that no one person or minister’s adviser could derail it.’ Käosaar (2009) also stated she believed that Reps, who was the Minister in 2005, was actually supportive of immersion and that it was her adviser who tried to wield her own power. What is less important than the motivations for placing the Immersion Centre’s financing in jeopardy, is that stakeholders demonstrated agency acting ‘with initiative and effect in [the] socially constructed world’ (Hunter and Cooke, 2007: 72) to save the Immersion Centre and the programme.

From 2006 onward, the Immersion Centre continued to face emerging challenges. Käosaar, the Manager of the Immersion Centre left her post for one at the EMER. The new Manager went on maternity leave shortly after being hired, as did the newly appointed Acting Manager. The Centre moved from its premises in a school into the Integration Foundation. Several Immersion Centre

colleagues expressed to me dissatisfaction with this move, and with the Foundation's management practices. Some staff members resigned. The Immersion Centre was liquidated in name and its functions given to a department in the Integration Foundation. However, at the end of 2010 the Head of the Integration Foundation was asked to step down, and Kāosaar who is now the Head of the General Education Department at the EMER and a member of the immersion programme's steering committee told me that the Immersion Centre would be re-established.

Conclusion

Establishing the Estonian early and late immersion programmes constituted a highly complex undertaking requiring the cooperation of a broad range of stakeholders including politicians, government officials, foreign partners, teacher trainers, parents, headteachers, and teachers. Encouraging stakeholder agency, listening to stakeholders, fostering frank discussion, and leaving stakeholders the time needed for developing enhanced understanding of immersion were central to building programming. Furthermore, an understanding that current discussions are rooted in the past proved helpful in navigating the present and preparing for the future. A consistent effort to draw in stakeholders, including very high status individuals, also contributed to the co-construction of a common narrative, a coherent set of messages about the past, present and future. This coherent set of messages can be seen as helping to build a collective sense of stakeholder purpose and identity, and offering a measure of stability to those engaged in the development of systems for creating the immersion programme.

The Immersion Centre and its staff were the central node in building the stakeholder network. Not being a legal entity, the Immersion Centre had to use moral authority as opposed to legal or positional power to achieve the intended programme outcomes that had been agreed with stakeholders. This in turn may have encouraged Immersion Centre staff to work harder in ensuring that the immersion programme was delivering value for its stakeholders. A culture of results and effects-based planning and reporting served a two-fold purpose. It provided guidance and structure in developing programming, and gave a voice to stakeholders, *de facto* sharing power with them. For example, researchers were able to bring out programme weaknesses and parents were able to raise their concerns. The Immersion Centre considered these as part of the public narrative about immersion, balancing concerns by explaining ways they would be addressed. Not seeking to present a perfect image, the Immersion Centre may well have protected itself against criticism by helping to normalise critical discussion. The stakeholder-inclusive approach recognised the role stakeholders had in building programming thereby sharing among them responsibility for programming including the development of learning materials, the quality of teaching, planning and working together to ensure sufficient financing.

Accomplishments were widespread demonstrating the broad range of investments required to develop programming and that a wide range of criteria can be used to judge programme success. Moreover, behind the various programme achievements were complex projects of their own requiring widespread and in-depth knowledge, and skill. For example, not only did those contributing to the development of learning materials need knowledge about bilingual education, they also had to understand how materials could foster critical thinking and learner autonomy while building connections to students' lives. Without this, materials risked being less meaningful to students and less effective as learning tools. Immersion Centre staff required considerable knowledge and skill to manage learning materials development. An extensive consultative process was insufficient for developing high quality learning materials. Additionally, the Immersion Centre staff had to have a grasp of the high standards it wanted to achieve and the grounded professional confidence and skill to challenge and support authors and illustrators in improving their products. Similarly, developing a strategic plan required a wide range of investments. Skilled facilitators had to be found and helped to understand the Estonian context and needs, and a common vision developed about how to develop a strategic plan that could be processed easily by stakeholders. The right stakeholders had to be involved for a week in developing the plan. The plan had to connect with and help build a larger narrative. This included integrating the plan with future government decisions, budgets and plans.

However, no amount of planning could allow the Immersion Centre to foresee all the emergent issues that arose, or the character of those issues. Emergent issues included the death of a key player, several of the Immersion Centre managers leaving their post, and a change in Government that placed Immersion Centre and programme financing in jeopardy. Handling a crisis such as the potential closure of the Immersion Centre required stamina and the presence of mind to act quickly and forcefully in defence of the Centre and the programme. However, the Immersion Centre also did this in a respectful, non-emotional, fact-based manner that would allow the Centre to work in the future with those that may have sought to undermine it in the present. Key stakeholders from journalists to politicians, to headteachers, to students took action in defence of the programme demonstrating that they considered themselves as full-fledged, empowered and autonomous agents. By 2005, the Immersion Centre and its stakeholders had created a strong and complex system for developing programming, and stakeholders generally held and protected a common narrative about the programme making it resilient enough to withstand emerging threats.

Despite the breadth and depth of investments made into Estonian immersion programme development there is one notable absence from the discussion in this chapter. No one document summarised what programme stakeholders considered to be effective teaching and learning strategies in immersion learning environments. These would not be agreed upon until 2006. However, it is noteworthy that the Immersion Centre had created an immersion handbook with its Canadian partners that included many teaching and learning strategies and it offered teachers training sessions based on these strategies. It had also created pedagogically-focussed criteria for developing learning materials.

The practices used to develop the Estonian immersion programme that are discussed in this chapter coincide with those previously discussed in chapter two. It is the capacity to maintain practices over time that provides evidence of their habitual nature, which signifies that these are indeed practices and not 'one-off' actions. Some additional practices also become apparent in this chapter. In summary, the practices used to develop the Estonian immersion programme that were explored in this chapter include involving stakeholders in a broad range of meetings, conferences and planning exercises. Decision-making, hence power too, was shared with stakeholders. Stakeholder cooperation involved a conscious effort to build relationships. Publically recognising stakeholders for their actions contributed to relationship building. Unpaid consultants were well cared for and they had a clear role to play. Stakeholder cooperation also entailed creating value for stakeholders, with the Immersion Centre sometimes going beyond its mandate to support a stakeholder. Facilitating and navigating stakeholder relations required communication and negotiation skills such as the capacity to identify commonly held mainstream discourses. Grounded professional confidence was used by programme managers to challenge existing understandings and to foster learning. Moral authority rooted in knowledge, learning and consistent behaviour, was used more often than positional power. Learning continued to drive stakeholder cooperation, decision-making and relationship building. Both positive and negative feedback were permitted. A culture of enquiry, and research data played an important role in learning and stakeholder discussions. Problems were publically recognised and articulated as were the actions planned to address them.

Practices also included making an effort to operate on both the affective and rational levels. Knowledge was managed in the form of transparent criteria, jointly developed policies, reports, learning materials, notes, memos and plans. Seeking precision in language use and expressing ideas succinctly and in a reader-friendly manner were part of the work culture. Documents sought to build a common narrative tying together constituent elements whilst also tying the past, to the present and the future. Many jointly-produced documents acted as frameworks for supporting group decision-making. Documents and professional development opportunities were results-focused containing a bias for laying the groundwork for future actions. They sought to build more effective learning environments for students and contexts favourable for immersion. The practices were interrelated and aimed to operate as part of a larger system in support of the immersion programme. Efforts were made to integrate immersion programme planning and financing with existing structures. Planning included research and the possibility of adjusting plans as new needs emerged. Many initiatives during programme development were led by the Immersion Centre, but stakeholders also demonstrated initiative spearheading cooperation amongst themselves to build immersion programming and to defend their stake in it. Considerable time and energy was invested into providing the general public information about immersion. The unknown was regularly navigated but grounded in goals, criteria, policies and cooperation. Immersion Centre staff members were focused on programme building and not simply acting in an administrative capacity. The Immersion Centre demonstrated considerable autonomy in cooperating with stakeholders and in organising its own work, but when the Integration Foundation began to impose work practices such as having to demonstrate greater accountability for process, the Centre still

worked to maintain a focus on results. Emergent issues were at times dealt with swiftly and resolutely. Finally, rigour, overtime, going beyond the call of duty and high expectations for all stakeholders were hallmarks of the programme development stage.

The following chapter will explore the terms bilingualism, multilingualism and plurilingualism as knowledge of these concepts forms part of the foundation for bilingual education.

CHAPTER FOUR: BILINGUALISM

This chapter examines the terms bilingualism, multilingualism and plurilingualism, and related terms such as mother tongue. It aims to present and analyse a diverse set of interpretations of these terms and concepts by various individuals who work in diverse fields. An exploration of how these terms are understood and used in diverse contexts helps to draw out the complexities of achieving a common understanding and use of these terms within a group or a society at large. The various interpretations of these terms are either present or potentially present in any society and need to be navigated in bilingual education contexts. An understanding of these terms can contribute to the knowledgeable and systematic management and delivery of bilingual education. This is of particular importance in the Estonian context where language has and is being used for political purposes.

Multilingualism, plurilingualism and bilingualism

The Commission of the European Communities (European Commission, 2007: 6) defines multilingualism as ‘the ability of societies, institutions, groups and individuals to engage, on a regular basis, with more than one language in their day-to-day lives.’ The European Commission (2005: 3) also refers to multilingualism as ‘the co-existence of different language communities in one geographical area.’ Thus, for the European Commission (EC) multilingualism focuses on the co-existence of and the regular engagement with more than one language in one territory. Language is not problematised, but rather it is presented as a positive, or, at the very least, as a neutral force in the co-existence of people on an individual, group, institutional and societal level. This broad definition embraces both the concepts of multilingualism and plurilingualism as defined by the Council of Europe, which makes a distinction between multilingualism as a description of social organisation, and plurilingualism as an individual linguistic and cultural competence in more than one language and culture.

Multilingualism refers:

exclusively to the presence of several languages in a given space, independently of those who use them: for example, the fact that two languages are present in the same geographical area does not indicate whether inhabitants know both languages, or only one (Council of Europe, 2007a:17).

Plurilingualism refers to:

[t]he ability to use several languages to varying degrees and for distinct purposes is defined in the *Common European Framework of Reference for Languages*²¹ (p.168) as the ability 'to use languages for the purposes of communication and to take part in intercultural action, where a person, viewed as a social agent, has proficiency, of varying degrees, in several languages and experience of several cultures'. This ability is concretised in a repertoire of languages a speaker can use (Council of Europe, 2007a: 17).

The distinction is significant for it stresses the ability and the responsibility of the plurilingual individual to bridge the multilingual social order. A plurilingual individual is not only defined in linguistic terms, but is considered capable of crossing both a linguistic and cultural divide, having linguistic and cultural competences that are evidenced by intercultural communication and enrichment. Plurilingual co-existence includes a process of cross-fertilisation or 'intercultural action' (*ibid.*).

The language learner becomes plurilingual and develops interculturality. The linguistic and cultural competences in respect of each language are modified by knowledge of the other and contribute to inter-cultural awareness, skills and know-how. They enable the individual to develop an enriched, more complex personality and an enhanced capacity for further language learning and greater openness to new cultural experiences (Council of Europe, 2007b: 43).

What the [Council of Europe's] term plurilingualism refers to is the capacity of individuals to use more than one language in social communication whatever their command of those languages. This set of skills constitutes the complex but unique competence, in social communication, to use different languages for different purposes with different levels of command (Beacco, 2005: 19).

The Council of Europe's plurilingualism definition places no emphasis on grammatical accuracy. It makes no mention of accent. The threshold level for defining plurilingual competency is the ability to communicate using more than one language. It also includes social and intercultural competences that are part and parcel of communication through different languages. The same can be assumed for the EC's definition of multilingualism. Neither should the EC's broad definition of multilingualism, or the Council of Europe's definition of plurilingualism be considered to include the concept of 'polyglottism' that describes an individual who is 'a particularly expert plurilingual speaker' (*ibid.*).

Plurilingualism as defined by the Council of Europe and the EC's definition of multilingualism are terms of inclusion, as opposed to exclusion or elitism. They do not label the speaker in any

²¹ The *Common European Framework of Reference for Languages* describes a series of language competences that are acquired during the process of developing fluency in any language.

way by setting high or unattainable standards that could act as instruments of exclusion. This understanding is in stark contrast to some earlier definitions of people who can speak two or more languages. For example, Bloomfield (1935: 55) defines bilingualism as ‘the native-like control of two or more languages.’ Bloomfield seems to view a bilingual as two or more monolinguals in one individual. Native speakers of any given language speak that language with varying degrees of proficiency, hence Bloomfield’s definition is fluid, and lacks solid points of reference. Some people speak their native language with great grammatical precision and have a command of many registers of language, while others operate with less grammatical precision and fewer or less developed registers. For example, working class and middle class children often use different codes of language, with working class children less likely to use the universalistic, context-free and explicit language of schools than their middle-class counterparts (Bernstein, 1971: 66). Further, it is inconceivable that any one individual could have a full command of all registers of language covering such areas of knowledge as nuclear physics, gang slang, opera and botany. In fact, Bloomfield (1935: 55-56) himself struggles to provide clear parameters for his own definition of bilingualism stating that ‘one cannot define a degree of perfection at which a good foreign speaker becomes a bilingual’.

Moreover, Cummins (2000: 54) points out that ‘there is still relatively little consensus on the theoretical nature of second (or first) language proficiency and its development in different contexts.’ Consequently, one should be cautious in judging the quality of language and, in particular, in making judgements based on language. Commonly, people judge another person’s command of their strongest language against their own proficiency in that language.

García (2009: 5) argues for a more ‘modern’ view ‘where bilingualism is not simply seen as two separate monolingual codes.’ She appeals for practices that ‘reflect the complex multilingual and multimodal communicative networks of the 21st century’. Such a view does not seek to idealise bilingualism and plurilingualism, but rather presents a more pragmatic understanding of the bilingual/plurilingual individual that is grounded in the daily realities of the modern world. These realities take into account the estimate that about half of the world’s population ‘are native speakers of more than one language’ (Fromkin *et al.*, 2007: 343), and that ‘three-quarters of the human race’ speaks two or more languages (Crystal, 2005: 409). Thus, bilingual/plurilingual discourse is a likely daily reality in economic and/or social discourse for the majority of the world’s population. This daily reality is driven by a need to communicate, not by a need for perfect grammar and form.

The Council of Europe’s definition of plurilingualism and the EC’s definition of multilingualism can be seen as a more *modern* view of bilingualism (language skill in two or more languages), as they take the above into account by not setting any greater level of proficiency for the plurilingual individual than that of being able to use language to communicate in one’s daily life. These definitions echo Macnamara’s (1967: 59-60) description of bilinguals as those who ‘possess at least one of the language skills [listening, speaking, reading and writing] even to a minimal degree in their second language.’ In addition, the Council of Europe (2007a: 11, 25) sees plurilingualism as

having ‘a single nature’ consisting of an integrated set of language and cultural skills, as opposed to being viewed as a multiple set of monolingual skills. This view gains credence from several researchers in language education who demonstrate how skills from one language are applied when learning another, and how L2 learning can support L1 development (Cloud *et al.*, 2000; Cummins, 2000; Genesee, 2005).

The role of context

Neurolinguists and neurologists, who seek to distinguish the effects of bilingualism or plurilingualism on the brain, also define bilingualism, multilingualism and/or plurilingualism. Their definitions fall within the scope of meaning of those by the two pan-European bodies (*op. cit.*). However, the Council of Europe’s distinction between multilingualism as relating to territory and plurilingualism as relating to individuals is not taken into account in the following definitions and the three terms (bilingualism, multilingualism, plurilingualism) are in some cases used interchangeably. Neurolinguists de Bleser *et al.* (2003: 440) consider ‘bilinguals’ or ‘multilinguals’ as those individuals that have achieved ‘any level’ of language knowledge in either two or more languages at ‘any age’. This reductionist view of those terms allows for the measurement of varying levels of language knowledge and is no doubt influenced by the fact that neuro-imaging technologies are the primary instruments of measurement for these particular researchers. Further, this reductionist definition does not include the concepts of interculturality or context, however, de Bleser *et al.* (*ibid.*) do bring in the concept of age which is an important factor in the study of the brain and language, and in discussions relating to bilingual education. Ortiz, a neurologist, and his colleagues (2009)²² define plurilingualism as:

The ability to communicate effectively in more than two languages, and to respond, independently of the age at which those languages were acquired, to the demands of a given context.

In their definition of plurilingualism, Ortiz *et al.* (*ibid.*) do not expect the levels of language knowledge associated with polyglottism, but consider plurilingual individuals as being able ‘to communicate effectively’. Yet, they do not define ‘effective communication’ leaving the term open to a wide range of interpretations. Ortiz *et al.*’s (*ibid.*) definition subsumes such terms as space, geographical area and culture under the term ‘context’. Context is omnipresent. Context impacts on the individual, and delineates acts of communication. Thus, each study of plurilingual individuals, groups or societies needs to also include a study of the ‘given context’ (*ibid.*). Further, Ortiz *et al.* also introduce the element of age which is likely to have been subsumed by the European definitions.

²² Personal communication.

The idea of context is also stressed by Giussani *et al.* (2007: 1109) who provide the following definition: '[t]he term 'bilingual' refers to an individual who uses two or more languages or dialects in his or her everyday life, regardless of the context of use.' Giussani *et al.* (*ibid.*), as with Bloomfield above, blur the lines between bilingual and plurilingual individuals stating that a bilingual speaks two or more languages. Further, they add an important nuance to the vision of a bilingual/plurilingual individual by making a distinction between a language and a dialect. The distinction between the two is far from self-evident, and is particularly sensitive to context including political manipulation. Max Weinreich suggests that 'a language is a dialect with an army and a navy' (cf. Romaine, 1994: 12 referring to Weinreich, 1945). For example, Basque was considered by many under the Franco dictatorship as a Spanish dialect (García, 2009: 33). However, linguists consider Basque an isolated language family in itself (Cenoz, 2009: xiii). Designated a dialect, the Basque language lost status during Franco's rule, and the right to be used as a medium of instruction. García (2009: 34) provides other examples of how context dependent the distinction is between a language and a dialect:

Batibo (2005: 2) gives us the example of the Chagga people, at the foot of Mount Kilimanjaro who consider themselves speakers of one language, although linguistically there are three different speech forms which are not mutually intelligible. In contrast, speakers of Sesotho, Setswana and Sepedi in southern Africa see themselves as speaking three different languages, although they are mutually intelligible and could be considered varieties of one language.

Terminology surrounding language is politically and ideologically charged. For example, the decision to designate a language as a language or a dialect as a dialect constitutes 'social and political stakes for individuals and for groups' (Council of Europe, 2007a: 50). To avoid ambiguities in terms such as language, dialect, regional language and indigenous language, the Council of Europe uses the term 'linguistic variety [...]' to refer neutrally to languages, whatever their status' (*ibid.*). Individuals or groups are not necessarily aware of how politically charged these terms are, and that they hold different meanings for different people or groups. Thus, the meaning of these terms needs to be clarified based on research evidence and negotiated, particularly when discussing language and bilingual education policy or programming.

One major reason that issues related to language are so politically and ideologically charged, and tied to context is the fact that the vast majority of languages in the world are considered under threat. Threat implies a struggle. Krauss (1992: 7) states that 90% of languages will face either 'death' or 'doom' during the 21st century. David Crystal (2000) speaks of and documents 'language death'. Baker and Jones (1998:157) consider the transfer of African slaves to plantations 'in linguistically mixed groups to avoid the possibility of conspiracy and revolt' as one example of how the elimination of African languages in the Americas 'could be compared to murder'. Further, Baker (2003: 91) sees the continued decline of native American languages as 'an example of language genocide and eradication rather than language suicide or natural change.' Yet, Baker (2003: 97-111) also analyses the case of Welsh to show how language planning can

contribute to language maintenance or even revitalisation. Language planning usually involves three intertwined operations:

[s]tatus planning (e.g., raising the social, economic and political (sometimes religious) status of a specific language across as many language domains and institutions as possible), corpus planning (e.g., modernising terminology, standardisation of grammar and spelling) and acquisition planning (creating language spread by increasing the number of speakers, opportunities to use the language, and incentives to motivate use) (*ibid.*: 93)²³.

Estonian is a language that has struggled for its survival. This has had an impact on Estonia, Estonians and Estonian, as well as on other language communities in the country. Estonia faced a period of intense russification in the late 19th century at which time Russian was imposed at all levels of education, and public administration. This was a clear case of status and acquisition planning. By contrast, after gaining independence in 1920 from Russia, Estonia offered, as of 1925, the option of cultural autonomy including mother tongue education to its small Russian, German, Jewish and Swedish minorities (Smith, 2001: 8-17). This can be considered an act of status and acquisition planning. Cultural communities with more than 3,000 members were able to form cultural corporations and elect a governing council that had full autonomy over minority schools and cultural institutions (*ibid.*). Thus, minority languages were accorded a form of official status not offered elsewhere in Europe, and language acquisition within a community structure was financially supported by the local and central government. Cultural councils could also impose taxes on their members (*ibid.*). Bilingualism enjoyed high status in the eyes of the independent Estonian Government of the day.

In the post World War II years, under Soviet occupation, a new wave of russification took place in Estonia, and this happened despite an official discourse that favoured multiculturalism (Grenoble, 2003; Rannut, 1995; Raun, 2001). Large numbers of Russian immigrants arrived. In certain parts of the country such as in the northeast, Estonians became a minority, and Russian became the language of commerce and government services. Acquisition planning favoured Russian language learning among Estonians. By 1975, all doctoral dissertations had to be written in Russian and by 1981, Estonian-language schools provided nearly three times more hours of instruction in Russian than Russian-language schools did in Estonian (Raun, 2001: 212-213). Moreover, Raun states that the teaching of Russian began in Estonian-language pre-schools, whereas the teaching of Estonian began in Grade three in the country's Russian-language schools. A secret decree by the Central Committee of the Communist Party of Estonia declared Russian in 1978 as the only 'language of participation' in society and teachers were ordered to teach students 'to love the Russian language' (Rannut, 1995: 202) – a clear attempt at status and acquisition planning.

²³ Cf. Baker (2003: 93) referring to Cooper (1989), Daoust (1997), Dogancay-Aktuna (1997), Hornberger (1994), Kaplan and Baldauf (1997), Wiley (1996).

The above decisions regarding education epitomised how the primary responsibility for bilingualism was being placed on Estonians, as opposed to Russians. However, fluency in Russian was officially in decline with the Soviet census of 1979 indicating that 23.3% of Estonians reported fluency in Russian, a 15.4% decrease from the 1970 census (Panagiotou, 2001: 269 referring to Dellenbrandt, 1990). This was widely believed to be an attempt to resist russification by reporting low levels of Estonian-Russian bilingualism making it more difficult for the Soviet authorities to justify any further future shift to monolingual Russian policies. Throughout the country, in the last decades of the Soviet occupation, the delivery of certain essential services shifted towards the exclusive use of Russian. However, generally speaking, Estonians continued to transmit their language to their children and school their children through their own tongue. Yet, despite considerable corpus planning (Miljan, 2004: 74), the heavy presence of Russian was also beginning to influence the language corpus (Grenoble, 2003: 98).

To navigate and analyse bilingual context, and more specifically language maintenance or shift, Fishman (1991) proposes that the following three elements be considered: habitual language use, behaviour towards language, and socio-cultural change. Wei and Milroy (2003: 129) develop a 'Market, Hierarchy and Network Model' inspired by the work of political economists Frances *et al.* (1991). Wei and Milroy (*op. cit.*) compare languages to a commodity competing for a share of the market, but point out the possibility of unfair competition and monopolies. With the term, hierarchy, they invoke levels of decision-making from the individual, to the family, to the neighbourhood, to the national government. The use of 'network' emphasises that individuals operate 'on a day-to-day basis in their immediate, localised networks' (Wei and Milroy, 2003: 131). Networks function with a common ethic or good, and make decisions that influence their behaviour in order to resist external pressure. Market, hierarchy and network function as an integrated whole. They are all part of the context that needs to be considered when analysing the bilingual/plurilingual context, for languages are not static, but more akin to dynamic organisms that are either in decline or on the rise. Any two languages existing in the same space are in competition with one another and '[i]n most bilingual communities the two (or more) languages do not have equal status' (Appel and Muysken, 1987: 59), and consequently, they do not have equal power.

Mother tongue

None of the above definitions of bilingualism, multilingualism, or plurilingualism mentions the concept of mother tongue. This absence suggests that the retention of mother tongue is in these cases not being placed at the forefront of discussions about bilingualism, which may weaken opportunities for those whose mother tongue is under threat to preserve it. The United Nations Educational, Scientific and Cultural Organization (UNESCO) convened a Committee of Experts in 1951 to consider the issue of language as a medium of instruction. The Committee's report (UNESCO, 1953: 46) defines mother tongue as 'the language which a person acquires in his (*sic.*)'²⁴

²⁴

Sic. here and throughout refers to an archaic use of the term in quoted material.

early years and which naturally becomes his (*sic.*) instrument of thought and communication'. The report goes on to say that for the individual:

[p]sychologically, it [mother tongue] is the system of meaningful signs that in his (*sic.*) mind works automatically for expression and understanding. Sociologically, it is a means of identification among the members of the community to which he (*sic.*) belongs. Educationally, he (*sic.*) learns more quickly through it than through an unfamiliar linguistic medium (UNESCO, 1953: 11).

The European Union has established a goal of 'mother tongue plus two other languages for all' its citizens (European Commission, 2003: 7), yet the European Commission's definition of multilingualism does not mention mother tongue. Although the Council of Europe's definition of plurilingualism does not mention mother tongue, the Council (2011) has stated that it 'includes the language variety referred to as "mother tongue" or "first language" and any number of other languages or varieties.' Still, it is noteworthy that the initial definitions do not clearly include the notion of mother tongue or L1 retention and development within the concepts of bilingualism, multilingualism or plurilingualism.

This right to speak, learn and use one's mother tongue or L1 is far from self-evident or universally applied. Moreover, the terms themselves are ambiguous. For example, some children grow up learning two or three languages concurrently (Council of Europe 2007a: 51; Barnes, 2006; Dorian, 2004: 446-7). One of those languages may be a mother tongue, one a father tongue and one a grand-parents' tongue. Moreover, in circumstances where mother tongue is facing state oppression such as is the case with Finno-Ugric languages in Russia (Saks, 2006), parents may choose not to pass on the mother and/or father tongue to their child. The child may first learn the national language, Russian, and only later as an adult learn what in more natural, tolerant or supportive circumstances would have been his/her first language. Thus, even if the mother or father tongue or tongues are never transmitted or learned by the individual, there are grounds for still considering them to be mother or father tongues (UNESCO, 1953: 47).

Yet, an individual need not consider his/her mother's or father's tongue as his or her mother/father tongue. To navigate such multilayered circumstances, a distinction can be made between native speech and mother tongue. Khubchandani (2003: 242) defines 'native speech' as 'the first speech acquired in infancy, through which a child gets socialized' contrasting this with the term mother tongue which is primarily 'categorized by one's allegiance to a particular tradition, [...] [which] is societally identifiable.' As much as this distinction can serve as a tool adding some nuance to the discussion, these terms must still be navigated with caution, for they hold the potential of contributing to the devaluing or dismissing of the wealth of an ancestral language, for example, in circumstances where a language community rejects its ancestral language. Also, interpretation of the term 'mother tongue' at a national or regional level can have significant consequences for the survival of a language and a language community. As previously mentioned, Basque (a non-Indo-European language) was officially considered under the Franco regime a dialect and forbidden as a medium of education, and as such did not have mother tongue status. Khubchandani (2003: 243

referring to Khubchandani, 1983) reports that in India in the 1950s mother tongue was considered by the Census of India as 'the mother tongue of the mother'. The children of an Estonian-speaking male, who consider themselves as native speakers of Estonian, despite the fact that their mother is primarily a monolingual Russian speaker, would have difficulty reconciling their understanding with that of the Census of India. Explaining how the Indian situation was even more complicated and open to interpretation, Khubchandani (*ibid.*) claims that:

British rulers and Indian elite put a greater weight on a broad interpretation of the mother tongue, that is, regarding all minority languages not having a written tradition as 'dialects' of the dominant language in the region. This interpretation amounted to an implicit denial of the rights of linguistic minorities [...].

Thus, in and across differing contexts, the term mother tongue is open to a wide range of interpretation both on a personal, state and international level. To avoid the ambiguity inherent in the terms, mother tongue, or first language, international conventions pertaining to the concept of mother tongue use terms such as language communities, one's own language, or language specific to the territory. Although seeking to avoid ambiguity these terms all invite their own wide range of interpretations.

International law and conventions

Concepts pertaining to the languages of minorities take on considerable portent in international law and conventions. However, these laws and conventions are often lacking in instruments of enforcement. For example, the *Universal Declaration of Linguistic Rights*, which was adopted in 1996, carries above all moral authority. It was signed by the United Nations Educational, Scientific and Cultural Organization (UNESCO, 1996), PEN Clubs and several influential non-governmental organisations. Key articles pertaining to language learning are:

Article 13: Everyone has the right to be a polyglot.

Article 26: All language communities are entitled to an education which will enable their members to acquire a full command of their own language [...] as well as the most extensive possible command of any other language they may wish to know.

Article 30: The language and culture of all language communities must be the subject of study and research at university level.

Article 44: All language communities are entitled to [...] support for activities such as teaching the language to foreigners, translation, dubbing, and sub-titling.

Article 52: Everyone has the right to carry out his/her professional activities in the language specific to the territory **unless the functions inherent to the job require the use of other languages**, as in the case of language teachers [...]

The emboldened text indicates potentially ‘weak or conditional language, [...] opt-outs, modifications, “claw-backs” ’ (Skutnabb-Kangas, 2008: 1). The right for ‘everyone [...] to be a polyglot’ suggests a significant degree of personal and societal investment, as the term implies high levels of proficiency in more than one language. Also, in this convention, in addition to the individual, the language community as a whole, and the languages themselves are accorded rights, and thus, become stakeholders in their own right that can affect or be affected by language and other policies. However, cultural rights are not addressed by this convention with the exception of language and culture being accorded the right of being studied and researched at the university level.

Another key international instrument pertaining to language is the Council of Europe’s *Framework Convention on the Protection of National Minorities*, which came into force in 1998. This convention is a legally binding multilateral instrument for member states that have ratified the convention, and is devoted to the protection of national minorities. Culture and language are linked in this convention. Key articles pertaining to language learning are:

Article 12

1. The Parties shall, **where appropriate**, take measures in the fields of education and research to foster knowledge of the culture, history, language and religion of their national minorities and of the majority.

Article 13

1. Within the framework of their education systems, the Parties shall recognise that persons belonging to a national minority have the right to set up and to manage their own private educational and training establishments.
2. **The exercise of this right shall not entail any financial obligation for the Parties.**

Article 14

1. The Parties undertake to recognise that every person belonging to a national minority has the right to learn his or her minority language.
2. In areas inhabited by persons belonging to national minorities traditionally or in substantial numbers, **if there is sufficient demand**, the Parties shall endeavour to ensure, **as far as possible** and within the framework of their education systems, that persons belonging to those minorities have **adequate opportunities for being taught the minority language or for receiving instruction in this language**.
3. Paragraph 2 of this article shall be implemented without prejudice to the learning of the official language or the teaching in this language.

The emboldened phrases highlight that this convention is open to widespread interpretation, and as such offers little support for minority language protection. For example, ‘**as far as possible**’ can

simply be used as a carte blanche to state that due to a climate of fiscal restraint or due to a lack of teachers and learning materials, it is not possible to offer quality minority language programming. And this can be so despite the fact that expert analysis might demonstrate that teaching through the minority language could be accomplished at a low cost and that qualified staff are available. No process is defined for determining whether the provision of minority language instruction is 'possible'. Moreover, the term, national minority, is not defined by the convention. As part of its instrument of ratification, Estonia declared:

The Republic of Estonia understands the term "national minorities", which is not defined in the Framework Convention for the Protection of National Minorities, as follows: are considered as "national minority" those citizens of Estonia who:

- reside on the territory of Estonia;
- maintain longstanding, firm and lasting ties with Estonia;
- are distinct from Estonians on the basis of their ethnic, cultural, religious or linguistic characteristics;
- are motivated by a concern to preserve together their cultural traditions, their religion or their language, which constitute the basis of their common identity (Council of Europe, 2007c: 2).

For Estonia, 'longstanding, firm and lasting ties' refers to historical minorities consisting of Estonian citizens or their descendants who lived on the territory of Estonia prior to its occupation during WWII. More recent arrivals are considered either immigrants or descendants of immigrants. Nonetheless, Estonia offers language minorities the right to an education through that language where numbers are sufficient to maintain a school. For example, Russian speakers may study the majority of school subjects through Russian for the first nine years of schooling and up to 40% through the medium of Russian during the three years of upper secondary school (Riigikogu, 1993). Estonia's ratification declaration aims to protect the Estonian language in those areas of the country where Estonians constitute a minority, and to protect the language against the consequences of future immigration that could tip the demographic balance between Estonian and Russian speakers, in favour of Russian speakers.

Conclusion

It is noteworthy that scholars often use the term bilingual or bilingualism, to refer to individuals that can use two or more languages to varying degrees of proficiency, and that the terms plurilingual, multilingual and bilingual are often used interchangeably. The terms are often not defined in high profile literature about bilingualism, plurilingualism or multilingualism, but readers are expected to assume that bilingual, plurilingual and multilingual individuals have a certain command of two or more languages (Tokuhama-Espinosa, 2008; Fortune and Tedick, 2008). Still others consider that it may be the case that defining the term bilingualism 'is much too complex a question', and they chose to 'use the context they are working in [...] in assessing the degree of bilingualism'

(Altarriba and Heredia, 2008: 3). Yet, being able to explore the diverse layers of meaning within and among these terms and concepts can potentially help stakeholders in bilingual education to understand the complex nature of bilingualism. For the purposes of this thesis the terms bilingualism, multilingualism and plurilingualism are conflated and defined as the ability of societies, institutions, groups and individuals to engage, on a regular basis, with more than one language, including their first language in their day-to-day lives in a wide range of contexts.

This thesis will above all use the term bilingualism taking into account that bilingualism is a politically sensitive term and concept. Interpretations of the term and concept abound, and are not easily navigated. The same is the case for other terms such as, mother tongue, and minority languages. These terms and concepts are sensitive to context and cannot be separated from culture or politics. On an individual, group, state and international level, bilingualism can often involve a struggle among its stakeholders. Estonia, despite its history of occupation by foreign powers, has traditionally provided access to mother tongue education for its major minorities. For example, Estonia offers Russian-medium education from Grades 1-12. However, taking account of the perceived threat coming from Russia discussed in chapter two and russification pressures discussed in this chapter, Estonia has been careful on the international scene not to take on obligations that it feels may threaten the long-term viability of Estonian. Nonetheless, Estonia respects the spirit of the international conventions pertaining to language. The following chapter will explore the benefits of bilingualism.

CHAPTER FIVE: ECONOMIC AND COGNITIVE BENEFITS OF BILINGUALISM

This chapter focuses on the benefits of bilingualism for the individual, concomitantly making links to societal benefits. Although the terms bilingual and bilingualism can be used to describe or refer to people, groups, regions or countries that use two or more languages in a wide range of contexts, most research reported on in this chapter focuses on the use of just two languages. In particular, the economic and cognitive benefits of bilingualism will be explored, as they are not widely discussed in the bilingual education literature. These benefits can partly serve as a basis for discussions with politicians and other decision-makers and stakeholders regarding the need for improved access to bilingual education. In particular in the Estonian context, the cognitive benefits of bilingualism can provide those who speak a widely spoken language with additional evidence of the value of learning Estonian, a much less widely spoken language.

Economic benefits

The degree of economic gain from bilingualism for individuals varies across regions, nations, gender, sphere and level of employment, and depends on the value placed by a society on the language(s) involved. On the one hand, knowledge of additional languages is viewed as a means of adding value to existing human capital, by increasing the number of potential *trading partners* an individual can have, and by extension, thus contributing to regional or national economic expansion (Breton, 1998: 16-17; Pendakur and Pendakur, 1998: 90-91). On the other hand, the same researchers and others (Cummins, 2000: 41-52; Baker, 2006: 423) report that if knowledge of the language identifies the speaker as a member of an ethnic group that is being discriminated against, or if the particular language is not valued, then certain languages in certain contexts can act as a marker that becomes a barrier to employment and increased levels of individual income.

If the language is valued by society and is perceived as useful by the business community, bilingualism holds the promise of increased income for the individual. Fradd and Boswell (1999: 1-6), who studied income levels of immigrants in ten US cities, report that Hispanic bilinguals in the United States have higher earnings than English monolingual Hispanics in three cities within diverse demographic groups: Miami, Florida (primarily recent Cuban immigrants); San Antonio, Texas (primarily US-born Mexican-Americans); and Jersey City, New Jersey (primarily recent immigrants from Caribbean, and Central and South American countries). The correlation between bilingualism and higher earnings is not absolute as in other American communities studied by Fradd and Boswell (*ibid.*) the same results were not found. The benefits of bilingualism can vary

from region to region and are context dependent. For example, García and Mason (2009: 89) point to how the sizable Spanish-speaking Cuban community in Miami has invested in bilingual education and 'in the local market to build institutions run by bilingual citizens'. In other words, bilingualism has been planned for in the education system by offering a dual language provision. In addition, Spanish and English are widely used in, and bring benefit to the community.

Grin (2003: 19) reports how language knowledge is valued differently in various parts of Switzerland with competency in English bringing 'much higher rates of return' in German-speaking areas of Switzerland than in French-speaking areas of the country. Yet, in French-speaking Switzerland, competency in German leads to higher earnings than fluency in English. German is the dominant language of Switzerland, with 72.5% of Swiss nationals considering it their principal language versus 21% for French speakers (Lüdi and Werlen, 2005: 8). Moreover, German has maintained its position relative to French over several decades (*ibid.*), which coupled with the sheer size of the German-speaking community, means that German in Switzerland enjoys a high status. In such a context, it is not surprising that German language knowledge provides a premium for French speakers.

In Estonia, Krusell (2008a: 66) reports that bilingual (Russian, Estonian) ethnic non-Estonians, who are citizens of Estonia have slightly higher rates of employment than native Estonian speakers or non-citizens who do not speak Estonian. This implies that the Estonian labour market values Estonian-Russian bilingualism. However, other factors may also influence the situation. Ethnic non-Estonians who have Estonian citizenship may feel more at home in Estonia than is the case with non-citizens and this may affect their attitude and belief in their own employment prospects (Krusell, 2008b: 6). In addition, bilinguals may be better educated than monolinguals. The value of Estonian-Russian bilingualism is further reinforced by a government study reporting that half of young people seeking employment over a recent twelve-month period indicated that their lack of Estonian language knowledge was an obstacle to finding employment (Luuk, 2009: 63). In a nation where the only official language is Estonian this is an expected result.

Chorney (1998: 221) in a study surveying 63 leading Canadian companies concluded that there is 'overwhelming evidence that [official languages French and English] bilingualism increases an applicant's chances of getting employment' in Canada. Thus, bilingualism in Canada is seen as not just being a potential source of increased income, but as an advantage when competing for employment with monolinguals. Similarly, the Canadian Council on Learning (2008: 4) reports that when controlling for educational attainment and work experience people who speak both French and English earn about 10% more than English-only speakers and 40% more than French-only speakers. However, the earnings of bilinguals (French, English) vary from Canadian province to province, based on work sector and gender, and depending on the province, bilingualism correlates with increased earnings, a neutral impact on earnings or with decreased (in two provinces) earnings (*ibid.* referring to the 2006 Canadian census). It is noteworthy that in the Canadian province of Saskatchewan where no bilingual premium was evident on income, 53% of French immersion graduates reported 'that their knowledge of French has helped them

get a job' (*ibid.*: 5). The greatest bilingual premium is reported in the French-speaking province of Quebec, and this premium can be greater for men than women. Christofides and Swidinsky (2008: 24) found that French-English bilingual francophone men who work mostly in French earn 7% more than their monolingual counterparts, while that percentage stands at 20.9% for francophone men who frequently used English in the workplace. For bilingual francophone women, in Quebec, these figures stood at 8.1% and 14.9%. However, Christofides and Swidinsky (2008: 25) caution that factors other than language knowledge could have impacted on their above results, such as the possibility that '[o]nly the very able may have the requisite [...] second-language skills to compete for bilingual jobs.' Similarly, Grin (2003: 47) notes that increased levels of earnings for those who speak English in Switzerland may correlate with other factors besides language knowledge such as education.

Still, previous research in Canada has shown similar positive employment and income results for bilinguals, and that these vary from region to region. Pendakur and Pendakur (1998: 98) point out that men and women fluent in French and English were more likely to have employment and enjoy higher salaries than their monolingual counterparts in Montreal. At the same time, in Vancouver, official language bilingualism could actually harm job prospects (*ibid.*: 100). However, in 2006, bilinguals enjoyed higher rates of employment in Vancouver than monolinguals (Canadian Council on Learning, 2008: 3). Thus, the value of bilingualism changed over time, suggesting a need to measure the value of bilingualism over time.

It is also noteworthy that bilingualism can generate additional employment and economic growth when speakers of a language demand education, government, cultural or other services in that language. The vitality of a language, and its potential for bringing economic gain to its speakers, is tied to the ability of a language group to act, at the very least, in a coherent, if not coordinated and systematic, manner. Strubell (2001: 280) develops a model showing how increased numbers of people learning a language leads to increased demand for language-related goods and services. Feinberg (2002) and Grin (2008: 86 referring to de Swaan, 2002, van Parijs, 2004) underline the potential for bilingualism to generate jobs and economic growth. Under such circumstances, linguistic minorities may be well placed to market their bilingualism. However, looking at a Canadian context Heller (2002: 48-49, 59) argues that the market seeks high levels of skills in both languages and deems this as a demand for 'double monolingualism'. This also implies a capacity to effectively operate in two different cultural spheres.

However, individuals, governments and markets are likely to benefit from awareness-raising in how language for specific purposes could generate economic growth and personal gain. One need only walk in an entertainment district in Istanbul where restaurant employees, speaking limited amounts of a dozen languages ranging from English to Russian to German to Finnish, woo foreign clients into their establishments. In these circumstances limited competency in several languages has clear economic benefits for the individuals and the businesses involved. Another case in point is drawn from an article in *Wissen Spiegel* about Trier, Germany, the birthplace of Karl Marx. In Trier, 170 merchants have organised Chinese language classes (two ten-hour modules) to ensure

that they and their employees are able to better welcome Chinese tourists and further profit from the increased spending power and overnight stays of their Chinese visitors (Hasse, 2005).

For individual countries and for groups of countries, it is generally believed that bilingualism fosters communication and trade, while monolingualism acts as a barrier to trade and communication among groups or nations that do not speak the same language. According to a World Bank report (Chiswick *et al.*, 1996: 3), this monolingual barrier is considered equivalent to an increase in transaction costs or the costs of exchange and this is reported as translating into 'less exchange [...] in the economic, social and political spheres.'

A report published by the United Kingdom (UK) Department for Education and Skills (2002: 33) states that 20% of UK companies believe they have lost business because of the lack of language or cultural skills. Helliwell (1999: 12) concludes, based on a survey of 22 countries, that sharing a common language increases trade flows by more than 1.7 times. Thus, language skills can be considered essential in maintaining a balance in trade relations. Furthermore, CILT, The National Centre for Languages (2005: 3-6), reported that the UK exports more to English-speaking nations than it imports from them, whereas the reverse is the case with other nations. In Europe, according to the same report, the UK does most of its business with nations such as the Nordic countries where English is widely spoken and much smaller volumes of trade with much larger markets in Europe and elsewhere. This gives credence to Willy Brandt's statement that 'you can buy in your own language, but you must sell in the language of your customer' (Baker, 2006: 433).

As a further case in point, an EU-commissioned report (CILT and InterAct International, 2006: 5) states that 11% of EU small and medium sized enterprises (SMEs) reported losing a contract due to a lack of language skills. The report extrapolates that this represents an 11 billion euro loss to the EU economy. As this figure represents reported losses, the authors surmise that actual losses are likely to be much greater. Yet, the report also states that in the UK only 4% of SMEs indicated needing additional languages over the next three years, in comparison to 63% in Spain, 44% in Portugal and 34% in Slovakia.

Further, the CILT and InterAct International report (2006: 6) argues that UK higher education graduates partake less often in the EU's student exchange programme Erasmus than their Spanish or German counterparts, and that only one third of UK graduates are confident enough in their language skills to work abroad, compared with two-thirds of their European counterparts. Thus, UK graduates are less likely to bring back international expertise and contacts to their country, which translates into fewer economic opportunities for the UK in comparison to other EU countries.

Finally, in reference to the UK, the lack of foreign language skills among its citizens, and the need for other EU countries to invest heavily into learning English has led to a call to eliminate the UK's seven billion dollar EU budget rebate (de Lotbinière, 2008 referring to Gazzola, 2008). Grin (2008: 90) also draws attention to the UK's low rate of investment in foreign language teaching

and considers higher investments into foreign language education by other EU members states as a subsidy enjoyed by the UK. The actual costs of monolingualism to the UK have yet to have been fully quantified, and may be much greater than commonly believed.

There appears to be no one theoretical construct nor any one econometric model that takes into account all the benefits of bilingualism and that also considers the costs of monolingualism (e.g. lost opportunities, increased transaction costs), the costs of declining L1 competency whilst developing L2 fluency (e.g. impeded cognitive development, the perpetuation of poverty, mental harm and other negative impacts on health) (Mühlhäusler and Damania, 2004; Skutnabb-Kangas, 2008; Anders-Baer *et al.*, 2008), or the costs of perceived disenfranchisement or discrimination, and intergenerational conflict in groups where younger generations are undergoing language shift (Marsiglia *et al.*, 1998; Smokowski and Bacallao, 2006, 2007). For example, neither Grin's and Vaillancourt's (1999) framework for measuring the cost of minority language policies nor Grin's (2008) later work in the field, fully analyse such costs. However, Grin (2003: 43), in addition to pointing out some of the above factors, does identify the need to take into account the costs of 'worsening inter-group conflict', and students' 'school participation, graduation and drop-out rates' (Grin, 2007: 283), if a minority language is not given official status, or students are not schooled through that language. Furthermore, the theoretical constructs and econometric models do not take into account the added financial benefits of the possible link between bilingualism, improved cognitive capacity, creativity and innovation. Stolarick and Florida (2006: 1801, 1812) draw out some of these links and benefits:

[I]nnovations occur when individuals with high degrees of existing knowledge make novel and creative combinations of this knowledge with new insights observed or learned through spillovers. [...] Having access to multiple languages and cultures also seems to have a positive impact on the region's talent itself.

Nor do these constructs or models take into account the possible influence on health of the cognitive benefits associated with bilingualism, which are discussed later in this chapter. Neither do they consider the social, cultural and intercultural or other benefits of bilingualism. Finally, one cannot help but ask if, in general, monolingual high school, college and university graduates are as well prepared to benefit from international communication, mobility, perspectives and discoveries, as bilinguals. Conversely, are monolingual graduates as well equipped as bilinguals for the inter-cultural communication which is necessary in addressing the complicated, cross-boundary and cross-cultural issues that have high stakes consequences for all nations and the world at large – pollution, war, terrorism, migration and contagious diseases?

Much work remains to be undertaken in order to scope out the factors to be considered when determining the costs and financial benefits of bilingualism, and in actually measuring these costs and benefits, both at the individual and societal level. Moreover, bilingualism cannot be looked at in a vacuum and needs to be analysed with any costs and benefits associated with monolingualism, including lost opportunity costs for the individual and for society. Further, García (2009: 144) suggests that '[b]ilingual education costs must take into account non-material or [...]

‘cultural economics’²⁵ which includes non-material or symbolic values, as well as ‘environmental economics’ which weighs up the advantages and drawbacks of different policy options.’ Grin (2008: 84) also underlines the need to consider ‘non-material and symbolic values’. Although the task is both exceptionally complex and mammoth in scope, and ‘much work remains to be done at the conceptual level in order to develop more comprehensive theoretical approaches’ (Grin, 2007: 291), increased research into the economics of language, and language education would help provide a sounder foundation for planning and more informed decision-making about issues related to language. Yet, even without further research, there is already considerable information available which indicates that bilingualism holds substantial economic potential for the individual and for societies at large, and that monolingualism may lead to significant lost economic opportunities for individuals and societies. These are valuable arguments in justifying the need for maintaining and expanding the provision of bilingual education.

Cognitive benefits

It is believed by many researchers that bilingualism in any language improves cognitive functioning. In particular, it is believed that it increases the cognitive load that the bilingual individual can handle at one time, that it improves episodic and semantic memory, increases metalinguistic awareness, and encourages the development of higher-order problem-solving skills. This section will address those claims drawing on research, above all, from the neurosciences, but also from psychology, education and linguistics. All of these fields explore language and learning.

Language is not only socially constructed, but it has a biocognitive and neurocognitive basis (Ullman, 2006: 235). Dweck (2006) and Doidge (2007: 43) have likened the brain to a muscle that develops as it is exercised. Research shows that this is clearly more than just a metaphor as part of the corpus callosum in the brain of bilingual individuals is larger in area than is the case for monolinguals. Coggins *et al.* (2004: 72-73) found that ‘bilingual learning and use can have a profound effect on brain structures in general and the corpus callosum in particular.’

Further, despite the fact that young minds are particularly adept in learning, learning and changes in the brain resulting from learning occur throughout a person’s life. The professional discussion in the neurosciences is showing signs of an increased shift from speaking about ‘critical periods’ when a child can learn a new skill or develop a new ability, to a discussion of a ‘sensitive period’, and the ability of people to learn throughout their lives (Howard-Jones, 2007: 8; OECD, 2007: 166). This is in line with earlier work in second language acquisition. Although Hakuta *et al.* (2003: 37) point out that ‘second-language proficiency does in fact decline with increasing age of initial exposure’, they believe language learning is not restricted to a critical period. Furthermore, although most of the studies reported on

²⁵ Cf. *Journal of Cultural Economics*, and Hutter and Throsby (eds) (2007) for discussions about cultural economics.

below focus on people with a relatively high degree of fluency in at least two languages, it is becoming apparent that even in the initial stage of L2 learning changes occur in the brain:

Preliminary results from three studies indicate that classroom-based L2 instruction can result in changes in the brain's electrical activity, in the location of this activity within the brain, and in the structure of the learners' brains. These changes can occur during the earliest stages of L2 acquisition (Osterhout *et al.*, 2008: 510).

What is less certain is what these changes mean, and if these changes have a different significance depending on when L2 learning begins. However, a considerable body of evidence is pointing to a distinct bilingual advantage or premium. It has long been felt that bilingual individuals can look at the world from more than one cultural perspective. This likely helps them to better understand different perspectives. As Singleton and Aronin (2007: 83) state:

We note that multilinguals have a more extensive range of affordances available to them than other language users and we argue that their experience as multilinguals provides them with especially favourable conditions to develop awareness of the social and cognitive possibilities which their situations afford them.

A more extensive range of affordances or interpretations leads to a greater number of options from which to choose. This leads to a view of the bilingual as having increased competence or multicompetence. 'Multicompetence' was coined as a term to describe the added capacity resulting from bilingualism (Cook, 1991: 112). 'These subtle differences consistently suggest that people with multicompetence are not simply equivalent to two monolinguals but are a unique combination [...] so the multicompetence state (L1 + L2) yields more than the sum of its parts, L1 and L2' (Cook, 1992: 557). Thus, a bilingual individual that is seeking to solve a problem in one language is thought to be able to draw on the other language and related frames of mind to bring extra cognitive capacity to bear in solving a problem. 'The learner's playful use of multiple linguistic codes may index resourceful, creative and pleasurable displays of multicompetence' (Belz, 2002: 59). In a world that is thought to be more and more complex and placing greater and greater demands on the individual, strengthened multicompetence could bring extra resources to bear in meeting the challenges faced by individuals and societies.

In order to determine the degree of cognitive flexibility, that is to say the ability to notice and work with additional information at one time, some researchers ask their subjects (bilingual and monolingual subjects) to describe what they see in pictures that contain more than one embedded image. In two studies, Bialystok and Shapero (2005: 595) found that 'bilingual children were more successful than monolinguals in seeing the other meaning in the images'. It is also notable that 'bilingual children show an earlier understanding that other people can have false beliefs than monolingual children' (Goetz, 2003: 1). Thus, a bilingual has earlier access to a wider range of interpretations of information than a monolingual, and this holds the potential of greater cognitive flexibility.

In addition, bilinguals are thought to have greater control over their cognitive processes than monolinguals. The capacity to control or manage one's cognitive processes is referred to in the literature as executive function. Improved executive function is thought to help bilinguals to better focus their attention and improve problem-solving skills, and this from an earlier age through to a later age. In particular, this not only gives the early bilingual person a head start on monolinguals, but the brain may develop more sophisticated and durable wiring due to the 'massed practice' (Doidge, 2007: 156) over extended time that bilingualism provides. Bialystok (2007: 210) argues that:

The executive functions are basic to all cognitive life. They control attention, determine planning and organization, and inhibit inappropriate responding [...] Speculatively, these executive functions are recruited by bilinguals to control attention to the two language systems in order to maintain fluent performance in one of them. The massive practice that is involved in that application leads to the hypothesis that these processes are bolstered for bilinguals, creating systems that are more durable, more efficient and more resilient. Thus, for bilinguals, control over the executive functions develops earlier in childhood and declines later in older adulthood.

Bialystok *et al.* (2005: 40) attribute the improved executive function to the extra cognitive demand of managing two active language systems. An essential aspect in executive control is being able to determine which information is worthy of attention and which is not. In order to effectively solve a problem one needs to use relevant information and ignore the irrelevant. It is important not to allow irrelevant information to inhibit thinking. Thus, inhibitory control, the ability of the individual to ignore irrelevant stimuli, contributes toward effective thinking and decision-making. For example, McLeay (2003: 435) found that when monolingual and bilingual subjects were presented with more complex tasks, bilinguals had an advantage: 'The distracting influences [...] confuse the monolinguals, whereas the bilinguals are more able to resist the distractions of the irrelevant information in determining topological 'sameness' and are better able to encode the 'deep structure' of the images.' Similarly, Colzato *et al.* (2008: 302) concluded that bilingual individuals 'have acquired a better ability to maintain action goals and to use them to bias goal-related information. Under some circumstances, this ability may indirectly lead to more pronounced reactive inhibition of irrelevant information.' This ability may be of particular value in an information age where people in the developed world are presented with ever-increasing amounts of information.

It is not simply problem-solving that is improved through bilingualism, but learning in general. To learn one needs to focus one's attention. Moreover, it is thought that not only can bilinguals better avoid irrelevant information, they can also handle a greater amount of information and solve some types of cognitively demanding problems with greater ease than monolinguals. In studies involving multimedia gaming bilinguals performed better than monolinguals once the cognitive load was increased. As Bialystok (2006: 76) observes: 'because all the participants were highly practiced and efficient at performing this task, group differences emerged only when processing demands increased, setting limits on the performance of the monolinguals but not the bilinguals.'

This does not necessarily indicate that bilinguals are cognitively more capable than monolinguals, but that they may be better at processing a larger number of cognitive demands in a shorter timeframe. They may be able to handle more tasks at once. Learners in bilingual programmes in Belgium, Germany, Italy, Spain, and Switzerland are found to achieve better results in learning the target language and the content in other subjects than is the case with students in standard first language programmes (Gajo and Serra, 2002; Braun, 2007; Lamsfuss-Schenk, 2008; Sierra, 2008; Zydati, 2009). Even very limited forms of bilingual education restricted to 10% of the curriculum over four years appear to have a positive effect on learning in general. Van de Craen *et al.* (2007: 193) found that 'CLIL pupils outperform non-CLIL pupils' on standardised mathematics tests even when these students do not study mathematics through CLIL. Van de Craen *et al.* (*ibid.*) conclude that 'an enriched language environment seems to have a positive effect on learners' cognitive abilities'.

In addition to a growing body of research that suggests bilinguals have greater executive control, increased multicompetence, enhanced problem-solving skills and increased learning capacity, researchers are identifying other cognitive gains which are likely to add to a possible bilingual advantage. These include improved memory in bilinguals over monolinguals and greater metalinguistic awareness. Metalinguistic awareness is 'the knowledge we have about the structural properties of language, including the sounds, words and grammar of language' (Cloud *et al.*, 2000: 3). Heightened metalinguistic awareness allows bilinguals to compare their languages. This can lead to greater precision in the use of language. It can also serve as a tool in language learning as it can, for example, help bilingual students decode words in a text by drawing on knowledge from both of their languages. What is less discussed is that metalinguistic awareness can foster problem-solving. Bialystok (1986: 499) points out that by intentionally controlling linguistic processing a child can 'consider the aspects of language relevant to the solution of a problem.' Similarly, Clarkson (2007: 191) who studied bilingual students found that those who are successful in mathematics 'seem to have better metalinguistics skills that allow them to self-correct when solving problems, and are perhaps more confident in their approach to solving difficult problems.'

A bilingual mind draws on its metalinguistic awareness to understand that words can have more than one meaning or vary in their scope of meaning from language to language. Bilinguals are more likely to identify ambiguity in communication as they seek precision in the meaning of not just words, but of underlying concepts. This can help them to solve word problems in mathematics or contribute to greater sensitivity in interpersonal communication. More specifically, Moore (2006: 135) found:

[...] that bi/plurilingual children, in favourable contexts, do not hesitate to use all language resources at their disposal, individually and collectively. They are more open to variation and they show greater flexibility in adapting to new linguistic systems. Such orientations seem to relate to greater awareness of language patterns, and a more efficient (strategic) use of the resources at hand [...].

It can also be surmised that metalinguistic awareness is a sign of greater flexibility. Flexibility is considered an important skill in ensuring personal happiness (Csikszentmihályi, 1990; Seligman, *et al.*, 2007) and an important characteristic sought after by employers. Flexibility opens up more conceptual and pragmatic options for an individual. Kharkhurin (2007: 182) believes that 'bi- and multilinguals are 'cognitively more flexible' and this is facilitated by their increased metalinguistic awareness.' Moore (2006: 125) explains that 'competence in two languages, and specifically heightened language awareness, serve as resources to build knowledge in context.' As language learning requires considerable time, it is heartening that research seems to indicate that even low levels of L2 learning can positively impact on the brain leading to increased metalinguistic awareness. Eviatar and Ibrahim (2000: 462) found that 'even low levels of ability in the second language are related to metalinguistic advantages.' This has positive implications for bilingual education.

In addition to metalinguistic awareness and increased flexibility, some researchers believe that bilinguals have improved memory. For new learning to occur, it has to somehow or other link to current understandings and memories. The linkage of current understandings and new input, and the resulting interaction between new and old can lead to different, new and or enhanced understandings. Thus learning is tied to memory. Episodic and semantic memory are two functions within long-term memory. Research by Kormi-Nuori *et al.* (2008) suggests that the bilingual mind has superior episodic and semantic memory when compared to monolinguals. Episodic memory, as its name suggests, is about episodes or events and includes information about such elements as time, place, feelings and activities. Semantic memory includes general knowledge about, for example, ideas, facts and problem-solving. Kormi-Nuori *et al.* (2008: 93), who conducted four experiments on memory, concluded that:

[...] a positive effect of bilingualism was found on episodic and semantic memory tasks; the effect was more pronounced for older than younger children. The bilingual advantage was not affected by changing cognitive demands or by using first/second language in memory tasks. The present findings support the cross-language interactivity hypothesis of bilingual advantage.

Increased long-term memory should allow learners to work with greater amounts of information while expanding their understandings and knowledge base. This suggests that being bilingual can help foster learning in all school subjects. It also implies that policy makers should consider ways of fostering early bilingualism, by supporting home language development for those who are already bilingual, and by offering more early provision of bilingual education.

Health implications of cognitive benefits

Research points to the possibility that knowledge of more than one language slows down mental decline as a person ages. This may be due to the more complex neural circuitry of bilingual individuals. Not unlike the workings of a national electric power grid, the more complex the grid, the more options are available to bypass a failing part of the circuitry and maintain power to the system as a whole. Marder *et al.* (2008: 1) state that '[a]s scientists unlock more of the neurological secrets of the bilingual brain, they're learning that speaking more than one language may have cognitive benefits that extend from childhood into old age.'

These cognitive benefits appear to have health implications. If age-related decline can be slowed or diminished through bilingualism, this could have considerable consequences for individuals, their families and friends, and for society. Bialystok *et al.* (2007), who studied bilinguals who spoke a variety of 25 languages, report that the onset of dementia was delayed in bilingual individuals by 3.9 years even when controlling for factors, such as education, employment and gender. As Bialystok *et al.* (2007: 460, 463) explain below, it is not that the bilingual brain can better avoid pathology or disease, but that it is more adept at compensating for pathology or disease.

Cognitive reserve is considered to provide a general protective function, possibly due to enhanced neural plasticity, compensatory use of alternative brain regions, or enriched brain vasculature. [...] The speculative conclusion [...] is that bilingualism does not affect the accumulation of pathological factors associated with dementia, but rather enables the brain to better tolerate the accumulated pathologies (*ibid.*).

Thus, the long-term financial benefits to society of a policy that fosters bilingualism could be considerable. If bilingual individuals can stave off the negative effects of dementia for several years, this should lead to substantial savings in health care for individuals, families and states. Bialystok *et al.* (2007: 459 referring to Brookmeyer *et al.*, 1998) emphasise that 'a 2-year delay in onset of Alzheimer's disease [...] would reduce the prevalence in the United States by 1.94 million after 50 years, and delays as short as 6 months could have substantial public health implications.' Alzheimer's Disease International (2010: 2) in its *World Alzheimer Report 2010* estimates that dementia cost the world economy in 2010 USD 604 billion. Despite the fact that several scholars consider the majority of the world's population to be bilingual there are still substantial numbers of monolinguals who are missing the advantages of bilingualism. The potential additional health care costs associated with this monolingualism have yet to be quantified.

Conclusion

The benefits of bilingualism are far from fully understood or researched; however, a significant body of evidence points to increased economic gain for those societies and people who value and know how to exploit the bilingual advantage. Equally important, the lost economic opportunities

for individuals and societies resulting from monolingualism are only beginning to be understood, but it can be assumed that they are considerable, as are the costs of declining L1 competency. The debate about bilingualism would benefit from a wider interdisciplinary study of the economic implications of bi- and monolingualism. These economic costs and benefits need to be analysed through a wide conceptual lens that also includes social, political, and cultural impacts. Further, it is believed by many researchers that bilingualism improves cognitive functioning, and that this is independent of which languages are involved. In particular, it is believed that bilingualism increases the cognitive load that the individual can handle at one time, that it improves episodic and semantic memory, increases metalinguistic awareness, and encourages the development of higher-order problem-solving skills. These skills hold the potential of contributing to the economic, social, cultural and political well-being of bilingual communities. This is particularly important in the Estonian context where Estonian-Russian bilingualism holds the potential of helping to bridge tension arising from the country's complicated history. In addition, the health implications of bilingualism are likely to be considerable both for individuals and societies. Education systems can play an important role by fostering the development of languages people already speak and by helping people to learn new languages through effective bilingual education programmes. Due to a dearth of research on trilingualism, this discussion was limited to individuals who possess two languages to a greater or lesser extent. In the European context where the European Commission has set the ambitious goal of all citizens becoming trilingual (mother tongue plus two languages), there is a need to learn more about trilingualism. One primary means for a state to foster bilingualism is through education. The next chapter will explore bilingual education.

CHAPTER SIX: BILINGUAL EDUCATION

This chapter introduces the concept of bilingual education and related concepts such as additive and subtractive bilingualism. The distinguishing characteristics of prestigious bilingual education are explored in depth. This includes a description of the potential long-term impact of this form of education, its political and societal context, and its educational parameters. This helps to situate the Estonian immersion programme within the domain of prestigious bilingual education.

Bilingual education and related concepts and terms

Archaeological and anthropological evidence of dual language education dates back some 5,000 years (García, 2009: 13; Lewis, 1981: 199-259). Yet, as with the term bilingualism, the term bilingual education is the subject of a wide range of interpretations. Baker (2001: 213) suggests that bilingual education is ‘a simple label for a complex phenomenon’. Freeman (2007: 3-4) argues that in non-academic environments the term is ‘frequently misunderstood’ and that there is ‘considerable confusion and conflict’ about what the term means, ‘who is served by bilingual programs, what the goals of a bilingual program are [...], and whether bilingual education is or can be effective’. For example, in those environments bilingual education is used both to describe programmes that actively promote bilingualism, as well as those that do not (Baker, 2006: 213; May 2008: 19). García (2009: 11) suggests that it is a common mistake to believe that teaching immigrants in the United States, ‘using only English is bilingual education’. By contrast, many scholars in the field of languages maintain that effective bilingual education aims to support individuals in becoming and remaining bilingual throughout their lifetime (Genesee, 2005; Baker, 2006; Cummins, 2000). The use of a student’s L1 ‘solely as bridge’ to another language is not considered bilingual education (Gaarder, 1967: 110). Bilingual education involves the use of a child’s L1 and an additional language for the teaching and learning of content subjects such as Geography or Mathematics. Furthermore, Genesee (2004: 548) states that this form of teaching and learning must take place ‘for significant portions of the curriculum’ over several years. Also, in bilingual programmes both a child’s L1 and L2 are taught in Language Arts classes (de Mejía 2002: 46).

Although bilingualism refers to the use of two or more languages, most research in the field of bilingual education focuses on two languages (García, 2009: 11). The languages of bilingual education may be divided into ‘minority and majority languages’. Minority language speakers include the children of immigrants such as Spanish speakers from Mexico who settle in the United States, as well as Basques who have been living in their ancestral homeland for thousands of years

in Spain and France. In the European context, some minority languages such as Basque and Catalan are referred to as regional languages. A majority language is a society's dominant language, as is the case with English in England and the United States, but the term is fluid. In Bolivia where 62% of the population is of indigenous origin, Spanish, despite its numerical minority, is considered the society's dominant language, and thus perceived to be a majority language (López and Sichra, 2008: 295 referring to López and Sichra, 2002). In contrast to minority or regional languages, which are usually used to refer to historical minorities, the languages of more recent arrivals are referred to as immigrant languages. Immigrant languages are spoken by immigrants and possibly by their offspring. In Australia, immigrant languages have also been referred to as community or home languages and include aboriginal languages (Clyne, 1991: 3). Not only does the Australian case underline the context-dependent nature of navigating these terms, but by discussing aboriginal languages as part of a larger subgroup of community languages aboriginal languages may lose some of the status associated with being a unique group on their own.

Even when restricting the term bilingual education to those programmes that support individuals in becoming and remaining bilingual, one is still faced with a large number of variations in programming (Mackey, 1970; Rebuffot, 1998; Baker, 2006; Hélot and de Mejía, 2009). Moreover, research into bilingual education is part of such diverse fields of study as economics, history, psychology, linguistics, pedagogy, neurosciences, anthropology, migration, ethnic integration, and management sciences. 'Bilingual education is not a discipline, it is an interdisciplinary activity' (Fishman, 1976: 24). This underscores its complex and interconnected nature. One way of navigating such diversity is to frame bilingual education programmes according to their long-term linguistic impact on the individual. Broadly speaking, three types of programmes can be identified. These are 'transitional' using the L1 as a bridge to the L2 while fostering the assimilation of minority (immigrant, community, historical minority, non-dominant) language speakers into a society's dominant language and culture; those that help maintain L1 proficiency, as well as develop L2 proficiency; and those that develop full bilingualism, biculturalism²⁶ and biliteracy²⁷ in the L1 and L2 (May, 2008: 21). These variations in programming types raise issues of equity, respect, identity, rights, well-being and power.

Lambert (1975: 67), working in education, identified the processes of 'additive bilingualism' and 'subtractive bilingualism'. Additive bilingualism describes a process whereby a student acquires an L2 while also maintaining and developing his or her L1. Subtractive bilingualism is characterised by a process that sees the student's L2 (usually a majority or dominant language) supplant the L1 (usually a minority or immigrant language). In the worst-case scenario this leads to L1 loss. As language is part of a person's cultural identity, subtractive bilingualism is an act of aggression vis-à-vis a person's identity. It is also a manifestation of power relationships. According to Beardsmore (2003:15) 'the class factor plays a primary role which determines [...] whether bilingualism is additive or subtractive.'

²⁶ For the purposes of this thesis biculturalism is the ability to draw on and navigate the cultures of two or more language groups.

²⁷ For the purposes of this thesis biliteracy is the ability to read and write in two or more languages.

Otheguy and Otto (1980: 351) make a distinction between ‘static maintenance’, as opposed to ‘developmental maintenance’ programmes that seek to develop full bilingualism including full biculturalism and biliteracy. Static maintenance refers to ‘preventing the loss of whatever skills the students already have’ (*ibid.*). The distinction is valuable as it helps uncover and discredit the commonly held belief that language knowledge can be static. Otheguy and Otto (1980: 354) stress that ‘stasis in education is a contradiction in terms. The hallmark of a credible educational institution is that it changes students, it helps them grow and develop.’ Otheguy and Otto (1980: 355) call on school systems to either support L1 development or acknowledge that they are contributing to subtractive bilingualism. Thus, ‘static maintenance’ in a dynamic world can be seen, at best, as a short-term measure, and more probably as a myth. The long-term maintenance of a low status minority language, faced with a high status and powerful majority language, is unlikely.

In education, it is important to view the concepts of additive and subtractive bilingualism in the context of a person’s entire formal education. What may appear to be an additive bilingual programme in the first years of schooling may instead prepare students for a language shift to a society’s dominant language. This type of subtractive programming, whether well-intentioned or not, can have ‘serious potential cognitive and emotional risks for individual children that arise from this disapprobation of their in-group [...] and from the loss of their heritage language’ (Wright *et al.*, 2000: 64). Skutnabb-Kangas (2008) and Anders-Baer *et al.* (2008) state that subtractive bilingualism impedes cognitive development, perpetuates poverty and causes mental harm. Other researchers report on a perception of disenfranchisement or of discrimination, higher school dropout rates, and intergenerational conflict in groups where younger generations are undergoing language shift (Marsiglia *et al.*, 1998; Smokowski and Bacallao, 2006; Smokowski and Bacallao, 2007). Cummins (2000) and Baker (2003) detail similar negative consequences of subtractive bilingualism. Wright *et al.* (2000: 65) go on to point out that usually ‘(t)he greater the difference in the social status, institutional dominance, and numerical superiority between the two languages, the greater the subtractive power of the dominant language.’

Cummins (2003: 3-14) stresses that power relations between majority and minority groups are an important factor in bilingual education, and that these obscure the facts obtained from a wide body of research about bilingualism, as well as about effective and ineffective forms of bilingual education. Other researchers point to a similar dynamic (Banfi and Rettaroli, 2009; Crawford, 2007; García, 2009; Hamel, 2008) and the fact that minority groups may place a greater value on their children developing fluency in a society’s dominant language over fluency in their own language (Hornberger, 2007: 185). For example, California in 1998, Arizona in 2000 and Massachusetts in 2002 passed what is referred to as ‘English-only’ legislation that severely restricted the use of second languages (*de facto* Spanish) as a medium of long-term instruction, and this in some circumstances with the support of large percentages of native speakers of Spanish (Crawford, 2007: 146). This legislation disregards extensive research evidence showing that bilingual programmes lead to higher L1, L2 and general academic achievement for minority Spanish-speaking students than tuition strictly through the medium of English (Cummins, 2000;

Lindholm-Leary, 2001; García, 2009). The English-only movements in the United States presented language as a problem for Spanish-speaking minorities and, thus, for society at large, and it ignored the concept of language as a right and as a resource (Crawford, 2007). In England, Mehmedbegović (2007: 234) gives examples of how local government sees bilingualism 'as a barrier to learning' and Anderson *et al.* (2008: 183) suggest that immigrant languages and students' bilingual abilities are being marginalised.' Conversely, bilingual programmes for language majority students seeking to learn Japanese, French and other high status languages have generally not been problematised (Cummins, 2000; Anderson *et al.*, 2008). Furthermore, it appears that native speakers of a society's non-majority languages have at times been viewed with suspicion and as a threat to national unity in several nations (Cummins, 2000; Banfi and Rettaroli, 2009; Hamel, 2008). Thus, separating fact from fiction, and navigating political and ideological agendas, is a priority in the delivery of bilingual education programmes.

Prestigious bilingual education

State-financed bilingual education programmes intended for students from all social classes who develop 'two high status languages' can be grouped under the umbrella term 'prestigious bilingual education' (Baker and Jones, 1998: 15). Prestigious bilingualism implies that the languages concerned are generally not problematised and that they have the respect of the populace at large. However, such situations are complicated by the fact that the value of languages is constantly in flux. For example, driven by the increasing economic importance of China, Putonghua is gaining ground in England particularly in private sector education (Anderson *et al.*, 2008: 190). Minority languages such as Welsh, Basque and Catalan, which were once banned from education, are now all increasingly considered high status languages in their respective regions (Cummins, 2000; Baker, 2006). In Estonia, during the Soviet occupation, Estonian was a low status language for many Russian speakers, yet it remained high status among Estonian speakers. Estonia re-established independence in 1991, and became a member of the EU and NATO in 2004. As a consequence, the status of Estonian has risen among the country's Russian speakers, who report improved Estonian-language knowledge and more active use of the language (Vihalem, 2008: 78-79). Language status is always dynamic, constantly in flux, complex, not widely discussed, and therefore, difficult to navigate.

Researchers identify three types of additive bilingual education programmes using prestigious languages: one-way immersion programmes (Genesee, 2004); two-way immersion (dual language) programmes (Lindholm-Leary, 2001); content and language integrated learning programmes (Marsh and Hartiala, 2001). In immersion and CLIL programmes, two or more languages are used as the medium of instruction for content subjects such as Mathematics or Geography. One language is usually the society's dominant language. The other language is referred to as the 'immersion language' (Swain and Lapkin, 2005: 171) or the CLIL language (Mehisto *et al.*, 2008: 12). If a student belongs to the society's dominant language group, the immersion or CLIL language is likely to be the child's L2 (e.g. a child from an English-speaking family and neighbourhood

studying some subjects through English and some through French). If the child's home language differs from the society's dominant language, the immersion or CLIL language is likely to be the individual's third language (L3) (e.g. a child who speaks Bengali at home, who lives in an English-speaking neighbourhood, and who is studying some subjects through English and some through French). In double immersion programmes students study most of their subjects through two languages which are not their L1 (e.g. an English-speaking child in an English-speaking neighbourhood studying an equal number of subjects through Hebrew and French). For students in a double immersion programme, who do not speak the society's dominant language at home, the immersion languages are likely to be the individual's L3 and L4 (e.g. a child who speaks Russian at home, who lives in an English-speaking neighbourhood, and who studies an equal number of subjects through Hebrew and French).

The above immersion programmes are all considered one-way in nature. These can be contrasted with two-way immersion programmes where approximately half of the students speak the society's dominant language as an L1, whilst the other half speaks one and the same minority language as an L1. Normally, half of the classes are taught through one language and half through the other. For example, in the United States there are two-way Spanish-English, Korean-English and Putonghua-English immersion programmes (Lindholm-Leary, 2001: 35). These programmes provide students regular contact with native speakers of the language they are learning, and, thus, 'promote cross-cultural co-operation and learning' (Cloud *et al.*, 2000: 5). Moreover, these programmes help to equalise power relations between minority and majority students, as the 'burden' of becoming bilingual is shared by both the minority and majority students (Torres-Guzmán, 2007: 56). Yet, Torres-Guzmán (*ibid.*)²⁸ encourages educators 'to think about social interactions', as 'societally based power relations' can 'show up in group work and other instructional settings'. The status and power of one language can be so strong that a 50/50 balance in language use may not always be optimal. Nolan (2000: 40) reports on a two-way immersion school in Chicago that adopted an 80/20 (Spanish/English) model for the first four Grades in order to help raise the status of Spanish vis-à-vis English before shifting to a 50/50 model in Grade five. School leaders claim that this led to improved student learning of Spanish at no cost to English skills levels (*ibid.*). Two-way immersion programmes in the United States are usually referred to as dual language programmes (Lindholm-Leary, 2001).

Immersion (one-way and two-way) and dual language programmes generally aim to help students attain:

- age-appropriate levels of L1 competence in reading, writing, speaking, and listening;
- advanced levels of functional proficiency in L2 reading, writing, speaking and listening;

²⁸ Cf. Torres-Guzmán (2007: 56) referring to Freeman (1998), de Jong (1996), Perez and Torres-Guzmán (in press), Valdes (1997).

- grade-appropriate levels of academic achievement in non-language school subjects, such as Mathematics and Science; and
- an understanding and appreciation of the L1 and L2 cultures (Genesee, 2005: 6).

These goals stress the additive nature of immersion programmes and they address the concerns of the majority of parents who wish to ensure that children in these programmes are academically successful, that they develop L2 proficiency and that their L1 does not suffer (Beardsmore, 2002: 20)²⁹. Unlike standard L2 teaching, immersion and CLIL programmes use the L2 to teach content, as opposed to just language. These programmes aim ‘to create in school the same conditions that are associated with L1 acquisition; namely, social environments in which the individual is motivated to learn the L2 in order to communicate with significant others about meaningful and important matters’ (Genesee, 2005: 7 referring to Genesee, 1983, 1996).

Swain and Johnson (1997: 6-9) list features prototypical to immersion programmes:

- The L2 is a medium of instruction.
- The standard regional or national curriculum is used as a focus for learning.
- Overt support exists for the L1 by way of L2 language arts classes or instruction through the L1.
- The programmes aim for additive bilingualism.
- Exposure to the L2 is largely confined to the classroom.
- Students enter with similar and limited levels of L2 proficiency.
- Teachers are bilingual.
- The classroom culture is that of the local L1 community.

Swain and Johnson suggest that the programmes develop in a context where the L1 community culture dominates. In the Estonian context, the Estonian-language immersion programme is offered in Russian-medium schools, thus ensuring that students are still studying within their cultural sphere. Swain and Johnson also propose that the programme respect the locally applicable curriculum. Baker (2011: 240-241) suggests that immersion programmes move beyond the educational initiative stage by also supporting the achievement of a political or economic goal such as the Welsh developing their own national identity, or a country seeking an economic advantage through bilingualism. Swain and Johnson (*op. cit.*) argue that immersion students’ L1 be supported and that teachers be able in addition to the L2 to speak the L1. Genesee (2005:7) adds that the teachers need to have ‘native ability or near-native ability in the L2’. Baker (2011: 240) expects them to be ‘competent bilinguals’. In Estonia, the immersion programme uses the same national curriculum as other schools, L1 and L2 development are part of the programme goals, and the programme aims to support a wider political goal of fostering national stability (cf. chapter two and three). The Immersion Centre expects Estonian teachers

²⁹ Cf. Beardsmore (2002: 20) referring to Gajo (2000), Gajo and Mondada (2000), Gajo and Serra (2000).

to be bilingual. However, exposure to the L2 need not be restricted to the classroom. Swain and Johnson (1997: 7 referring to Beardsmore and Swain, 1985) refer to a study comparing Canadian immersion students in French-medium programmes who had little out-of-school exposure to French with their Belgian peers who had considerable out-of-school exposure to French and that concluded that Belgian students ‘required only half the time [...] to acquire comparable levels of L2 French proficiency.’ More recently, in societies where immigrant students are present Swain and Lapkin (2005) suggest using the multiple L1s of those students in the immersion classroom. Similarly García (2009: 153) proposes using ‘translanguaging’. Translanguaging involves having students use, for example, the L1 to research an assignment and the L2 to report on it. However, in immersion classrooms the L1 is ideally used judiciously to support learning of the L2 and not used to undermine high expectations regarding L2 learning.

Although Rebuffot (1998: 687) has identified 43 different variations in immersion programming, the various types of one-way immersion programmes are often divided into three broad categories: early immersion, delayed or middle immersion, and late immersion (Genesee 2005, 2008). Early immersion programmes begin in kindergarten, or Grade one when children are six-seven years of age. In Canada, two primary forms of early immersion are most common – early total immersion and early partial immersion with 80% of all Canadian immersion students attending early total immersion programmes (Dicks and Kristmanson, 2008: 16). In total early immersion programmes, all or almost all instruction during the initial years is provided through the immersion language (henceforth L2³⁰). In Grade three, the society’s dominant language (henceforth L1³¹) is introduced as a subject. From Grade four onward, subjects are increasingly taught through the L1. By Grade six, 50% of instructional time is used for teaching/learning through the L2 and 50% through the L1. In partial early immersion two languages are used for instruction from the start of schooling for 50% of instructional time each (Cloud *et al.*, 2000: 5). Delayed or middle immersion usually begins in Grade four or five. Prior to programme entry, students have usually received 30-60 minutes daily of L2 instruction from Grade one onward. In Grades four-six they receive about 50-60% of instruction through the L2 (Genesee, 2005: 12). In late immersion, students study the L2 as a second language from Grades one-six for 30-60 minutes a day. In Grades seven and eight, 80% of instruction is delivered through the L2 and 20% through the L1. In Grades nine-eleven, approximately 45% of instruction is delivered through the L2 and 55% through the L1 (Genesee 2005: 13). In all types of immersion programmes, languages are kept relatively separate with a given subject taught primarily either through the L1 or the L2.

CLIL is defined as ‘a dual-focused educational approach in which an additional language [L2] is used for the learning and teaching of both content and language’ (Maljers *et al.*, 2007: 8). However, this definition is open to interpretation. Cenoz (2009: 49) states that CLIL ‘does not give a preference for content or language’. Coyle (2008: 97) makes a similar claim. In contrast, Mehisto

³⁰ It is recognised that for students from immigrant or minority backgrounds the L2 may actually be their L3 or L4.

³¹ It is recognised that for some students the home language may not be the society’s dominant language.

et al. (2008: 30) maintain that CLIL is content-driven. Similarly, Coyle *et al.* (2010: 1) assert that 'CLIL is content-driven, and this is where it both extends the experience of learning a language, and where it becomes different to existing language-teaching approaches.' However, the claim of being 'different' based on the content-driven nature of CLIL does not apply to immersion programmes, as they use the L2 to teach content subjects. They are driven by content while seeking to support, at the very least incidentally, language learning (Snow *et al.*, 1989). CLIL literature associates itself strongly with immersion by often making reference to Canadian immersion research (Coonan, 2007: 627; Coyle *et al.*, 2010: 34-35, 116, 133-34; Dalton-Puffer under publication; Gajo, 2007: 565; Serra, 2007: 585). Instead of being different, distinct or unique, CLIL appears to be characterised by flexibility and inclusiveness. Marsh (2002:15) refers to CLIL as an umbrella term covering 'any dual-focussed educational context in which an additional language [...] is used as a medium of instruction' for non-language subjects. Mehisto *et al.* (2008: 12) also refer to CLIL as an umbrella term covering 'low- to high-intensity exposure to teaching/learning through a second language' and this in the short and/or long-term. It is generally agreed that CLIL covers a broad range of programmes where an additional language is used to teach content (Eurydice, 2006; Coyle *et al.*, 2010: 44; Gajo, 2007: 563; Maljers *et al.*, 2007; Marsh, 2002: 15; Serra, 2007: 582).

Part of CLIL's strength lies in its capacity to unite a diverse community that is focused on the teaching and learning of content through an L2 and/or an L3, be that using modules, for teaching one or more subjects, or for total immersion (Marsh *et al.*, 2009). This is also the approach's weakness as the CLIL community has not yet agreed on the parameters of CLIL. Mehisto *et al.* (2008: 12, 31) propose similar goals for CLIL as offered by Genesee (2005: 6) for immersion whilst offering an additional goal of having CLIL support the achievement of 'the cognitive and social skills and habits required for success in an ever-changing world' and whilst stressing the role of 'community' in learning. This is a socio-constructivist view as knowledge is seen as being constructed through habitual and skilled interaction with others. However, these goals have not been widely embraced in the CLIL literature. Much work remains to be done 'to consolidate the theoretical underpinnings of CLIL and create a conceptual framework that is both coherent and applicable to different local conditions' (Dalton Puffer, under publication). The goals of immersion as proposed by Genesee (2005: 6) and CLIL as proposed by Mehisto *et al.* (2008: 12) have the benefit of clearly situating CLIL in the additive bilingual domain. By contrast, Coyle *et al.* (2010: 6-7) appear to divorce themselves from the principle of additive bilingualism by describing language issues in Sub-Saharan Africa and stating that '[l]anguage policy needs to be implemented with language pragmatism and CLIL emerges as one solution for achieving this in different countries.'

Conclusion

Bilingual education is an exercise in power. The power dynamic is reflected in a wide ecology consisting of politics, government financing, inclusion, exclusion, and mental and physical health, among other issues. The power dynamic is also reflected in several key terms associated with bilingual education such as minority language, majority language, language maintenance and the term bilingual education itself. These terms are open to a wide range of interpretations. Considerable knowledge is required to navigate them in order to support the development of additive bilingualism and to counter subtractive bilingualism. For example, education programmes that may initially appear additive in nature can contribute to subtractive bilingualism in the long term. This implies that in order to have a reasoned dialogue about bilingual education those involved in it need to be able to navigate diverse interpretations of these terms and agree with stakeholders on their meaning. If this is not done there is a risk that unfounded beliefs can lead governments to foster monolingual programming and this with the support of language minorities.

The professional literature argues that state-financed immersion programmes intended for students from all social classes have the potential of helping to raise the status of the languages taught, and fostering student achievement and bilingualism. However, there is considerable diversity in how immersion programmes are delivered. Parameters such as the number of hours and years of instruction offered through the L2 may vary. There is general agreement that immersion students learn at least approximately half of their content subjects through the L2, teachers are bilingual and students learn the same curriculum as students in standard primarily monolingual programmes.

In addition, immersion researchers have largely taken a moral stance locating this form of prestigious bilingual education firmly in the additive bilingual domain, and pointing to the need to protect students' L1. In an effort to foster discussion about how CLIL could better situate itself in the additive bilingual domain the following new definition is proposed for consideration: CLIL is a dual-focused teaching and learning approach in which the L1 and an additional language or two are used for promoting both content mastery and language acquisition to pre-defined levels. This definition should be extended by adding more specific goals such as in the redefinition of bilingual education proposed below. As discussed in chapter four, one of the main elements of bilingualism involves intercultural communication, thus, a redefinition of the term bilingual education, which takes this into account, is proposed. In addition, in order to support additive bilingualism that is lifelong, reference is made to the final years of schooling. Bilingual education is redefined as an education programme that supports individuals in becoming and remaining bilingual (additive bilingualism). At least two languages are used to teach different content subjects such as Mathematics or History throughout the final if not all the years of school life. Bilingual education supports students in developing:

- age-appropriate levels of L1 competence in reading, writing, speaking and listening

- age-appropriate levels of advanced proficiency in L2 reading, writing, speaking and listening
- Grade-appropriate levels of academic achievement in non-language school subjects, such as Mathematics and Science taught primarily through the L2 and in those taught primarily through the L1
- an understanding and appreciation of the L1 and L2 cultures
- the capacity for and interest in intercultural communication
- the cognitive and social skills and habits required for success in an ever-changing world.

The following chapter explores research into immersion programmes.

CHAPTER SEVEN: IMMERSION PROGRAMME RESEARCH

This chapter examines student achievement in immersion programmes which are a form of prestigious bilingual education. Seminal Canadian and American studies are reviewed in depth, as evidence from these studies was used to justify programme development decisions in Estonia. The chapter also reviews criticisms made of immersion programmes. The often-cited example of the Hong Kong late immersion programme, where student achievement fell below expectations, is discussed. Finally the chapter reviews research evidence from less intensive L2 immersion-type programmes published under the heading CLIL. The evidence presented in this chapter provides a rationale for the development of the Estonian immersion programme.

Research evidence about immersion programmes

Although bilingual schools have a long history (García, 2009: 160-164), immersion programming is considered to have started in a kindergarten in St. Lambert, Quebec in 1965 (Baker and Jones, 1999: 496). Dissatisfied with the level of French fluency obtained by Anglophone children in the majority French-speaking Canadian province of Quebec, St. Lambert parents lobbied for the establishment of a total early French-language immersion programme.

Lambert and Tucker (1972) studied the first two cohorts of St. Lambert immersion students for five consecutive years. These two cohorts were each matched with one English-language control group from the same school, another (off-site) English-language control group from another school in the same neighbourhood, and with one French-language control group from a French-language school in the same neighbourhood. In order to minimise a possible ‘Hawthorne effect’³², the off-site English-language control group was drawn from a school ‘reputed for its methods of teaching English and French’ and the French-language control group participated in a ‘school-wide experiment in modern methods of teaching mathematics’ (*ibid.*: 27). Both cohorts of immersion students were admitted to the programme on a first come, first served basis. No ‘statistically reliable differences’ among the groups were detected with regards to parent socio-economic status, or student achievement based on the Raven Progressive Matrices test (1956) (*ibid.*:11).

Testing was carried out using standardised tests.³³ Lambert and Tucker (1972: 152-153) concluded that despite studying primarily through the medium of French, immersion pupils: ‘read, write,

³² Refers to a tendency among research participants to improve their behaviour during an experiment.

³³ Cf. Lambert and Tucker (1972: 26-34, 49-55, 71-74, 108-116, 143-44) referring to Peabody Picture Vocabulary Test, Metropolitan Achievement Test, Test de rendement en français, *et al.*

speak and understand, and use English as competently as youngsters instructed' through English; suffer no adverse effects regarding the learning of mathematics; acquire 'a thorough mastery of the basic elements of French phonology, morphology, and syntax, and can speak and communicate in French without inhibition or hesitation'; and, are acquiring 'the academic essentials needed to become balanced bilinguals.'

Despite consciously working to minimise the 'Hawthorne effect' whilst researching programming, it is noteworthy that the first cohorts of any new high profile programme are likely to receive greater attention than future cohorts. Moreover, the study did not follow the students through to the end of their formal education. Student achievement was measured in Mathematics, but not in other content subjects. Mathematics can be considered less language dependent than some other subjects, as it operates with its own set of symbols. However, as the programme was under intense scrutiny by many stakeholders, it is unlikely that learning in these subjects suffered. It is also noteworthy that the perceived success of the St. Lambert immersion programme led to the spread of immersion initiatives across Canada.³⁴

Despite the programme's reputation for success, programme development was difficult. Melikoff (1971: 219-236) explains that parents formed an association, lobbied local authorities for two years and voted in one of their association members to the School Board. They involved renowned experts and ran a media campaign (*ibid.*). In addition, they ran a short-term experimental immersion programme and identified a teacher before the programme was launched by the education authorities (*ibid.*). Moreover, parents had to remain vigilant, as the programme was under threat at the end of each academic year (*ibid.*). It faced continued and regular resistance from several stakeholders.³⁵ Parents had to work over a period of several years to dispel myths about bilingual education, to assuage fears such as immersion jeopardising English-language education or becoming too costly to manage, and they had to win the support of officials at various levels of the education system and government (*ibid.*). Also, the school faced difficulty in finding and keeping qualified teachers (*ibid.*).

In another seminal study, Swain and Lapkin (1982) researched three successive cohorts of students in total, early partial and late immersion programmes from 1970-1979. They concluded that 'there is nothing inherently impossible, or negative, in providing initial education through the medium of a second or foreign language' (*ibid.*: 1). However, they cautioned that the wider 'historical, cultural, economic and political' context all impact on these programmes and that they need to be taken into account (*ibid.*). The programmes that Swain and Lapkin studied were voluntary, students focused on the same curriculum as non-immersion students, and implicit and explicit instruction in the L2 and the L1 was provided. Also, parents were involved in establishing and ensuring programme continuation.

³⁴ Over 300,000 students or about 7% of the entire Canadian school population are enrolled in immersion (Canadian Council on Learning, 2007: 7-8).

³⁵ Cf. Lambert and Tucker (1972: 5) quoting the Association of (English-speaking) Catholic Principals of Montreal arguing that 'the average child cannot cope with two languages of instruction'.

Swain and Lapkin (*ibid.*: 16-35) used an extensive battery of standardised tests³⁶, samples of short story writing and interviews. Students were tested each spring. Any students from French-speaking homes were excluded from the French-language proficiency data set. Control groups were matched for similar IQ and socio-economic background. Although 'every attempt' was made to identify similar control groups, Lapkin and Swain (1982: 32) point out that, for example, early immersion children may be 'brighter, or more extroverted, or more verbal, or simply more able to cope', and that it is difficult to fully match control and study groups.

With reference to language proficiency Swain and Lapkin concluded that: 'all three programs have proven successful in promoting advanced French language skills' (*ibid.*: 84); 'early total immersion students attain near-native proficiency in listening and reading comprehension [...]'. Students speaking and writing skills remain non-native-like, although they have little difficulty in conveying what they want to say' (*ibid.*: 82). Early partial immersion students take longer to reach the levels of French language performance achieved by early total immersion programmes; however, it is noteworthy that the early partial immersion sample was limited to one class (*ibid.*). After three years in the programme, French language proficiency of late immersion students remained below that of early total immersion students and did not reach 'native-like levels of performance in listening comprehension' (*ibid.*: 82-83). In general, 'native French speakers assess immersion students' speech favourably' (*ibid.*: 55). Swain and Lapkin found that French language skills are likely to be enhanced by studying in a school where all children are enrolled in the French immersion programme (*ibid.*: 42-43). They also concluded that students in all three types of immersion programmes temporarily lag behind their peers in English-medium programmes in reading and writing in English (*ibid.*: 82). In the case of early immersion this lag disappears by the end of Grade three whilst in late immersion programmes the lag is shorter or does not occur (*ibid.*). They also found that the English reading and writing skills of early total immersion students were in the long run better than those of students in the English-medium programme (*ibid.*).

With reference to learning and achievement in subjects taught through French, Swain and Lapkin (1982: 68-69) concluded that early immersion programmes do not lead to 'cognitive confusion' or negatively impact on intellectual development. In contrast they found that early total immersion may even enhance students' intellectual development (*ibid.*). In addition, early total immersion students tended to have better work study skills than students in the English-medium programme with no such benefit being apparent for students in early partial immersion (*ibid.*: 84). Swain and Lapkin further argue that in all three types of immersion programmes students learn the target language and achieve academically in Mathematics, Science and Social Studies. It is noteworthy that the Swain and Lapkin late immersion sample was smaller than the early immersion sample and therefore not fully comparable. The Swain and Lapkin study implies that in the long run, immersion programmes appear to have no negative consequences for academic achievement, except that late and partial immersion students may face greater difficulties learning the content

³⁶ Cf. Swain and Lapkin (1982: 16-35) referring to Test de compréhension auditive, Test de compréhension de l'écrit (Commission Scolaire de Montréal); French Comprehension Tests (Barik, 1975, 1976); Raven Coloured Progressive Matrices Test; Canadian Cognitive Abilities Test, *et. al.*

during programme start-up before their language skills improve. Similarly, O' Muirheartaigh and Hickey (2008) who analysed Mathematics and Irish language scores found comparable levels of student achievement in Irish early and late immersion programmes, but also found higher levels of anxiety about L2 use among late immersion students. De Courcy (2002) argues that late immersion students require extra support in managing their emotions in the initial stages of programming. According to Swain and Lapkin (*op. cit.*) total early immersion appears to lead to better L2 achievement; however, it is possible that late immersion students will eventually catch up with early immersion students. More recent studies demonstrate that late immersion students achieve at the same level in the L2 as early immersion students, however as these students self-select they may be more motivated and practiced learners (Cenoz, 2009: 191; Genesee, 2004: 560). Late immersion students would require sufficient L2 input to achieve the same results as early immersion students. Genesee *et al.* argue (2006: 226) that in bilingual education 'learning takes time and is cumulative'. Swain and Lapkin (1982: 46) also report on a late immersion programme offered in Ontario where L2 input was insufficient and where late immersion students make 'no significant gains [...] from Grade 10 to 11, or from Grade 11 to 12.' However, even if students' L2 achievement in late immersion programmes were to be shown to be lower than is the case with early immersion students, this does not negate the value of late immersion programmes. The L2 achievement of late immersion students significantly surpasses that of students only studying the L2 in language classes.

Nonetheless, it is generally agreed that in all prototype Canadian programmes 'students have significant gaps in their [L2] grammatical and communicative competence' (Genesee, 2008:12). This means that although they understand French at near native levels they make grammatical errors in speaking and may not choose the appropriate registers of speech. Also, despite their evident success, Canadian immersion programmes face high attrition rates with the majority of early immersion students not continuing with the programme in high school (Cummins, 1998: 35). Obadia and Thériault (1997) attributed attrition primarily to peer pressure, a lack of variety in subjects offered through French and a perception that preparation for university is best achieved through English. Wesely (2010: 808-809) identified a divide between student beliefs about good teaching and actual teaching as a primary reason for leaving programmes. These findings suggest a need to view immersion education in the long-term, to ensure rich learning environments, and to enter into greater dialogue with students about their beliefs, expectations and the pressures they face.

Early and late immersion students are more motivated to learn the L2 than students who only study it in language classes. Genesee (1978) researched 65 early and 86 late immersion students to determine their feelings about French and immersion, their use of French outside of school and their motivation to learn French. Approximately one third of each sample fell into the following categories: above average IQ, average IQ, below average IQ (*ibid.*: 21). The students' attitudes were compared to those of control groups who were English-educated. The immersion students were generally happy with having chosen the immersion option even though one third reported that it involved more work (*ibid.*: 38). Although immersion students reported feeling more confident in speaking French, they did not appear to be more active than the control groups 'in initiating

conversations in French [...], [t]here was no evidence that they use their language outside of school or actively sought out situations where French could be used' (*ibid.*).

Genesee (*ibid.*: 38-39) speculates that this is because students reported being primarily motivated to learn French for instrumental reasons (e.g. improving job prospects), and considered speaking as their weakest language skill, and because the community norm was generally for parents to restrict their use of French to the work environment. Thus, the students in the Genesee (1978) and the Swain and Lapkin (1982) studies appear to be capable of crossing both a linguistic and cultural divide, which are two key criteria in the Council of Europe's (*op. cit.*) definition of plurilingualism. However, a third Council of Europe criterion is not met, as these students do not appear to be 'social agents' who initiate intercultural communication. Yet, Genesee (1984) argues that immersion students maintain their English-Canadian identity, but feel less distance between themselves and French-Canadians, have more positive attitudes towards speaking French, and reported using French outside of the classroom more often than is the case for their English-educated peers.

Two-way immersion

A distinctly different context for immersion exists in the United States in areas where a high percentage of students speak Spanish as an L1, and both Spanish and English speakers are enrolled together in the same two-way immersion programmes. Lindholm-Leary (2001) studied 18 schools offering dual language education (two-way immersion). All of the schools were in California with the exception of one in Alaska. Of these 18 schools, five were designated to be of 'low socio-economic need' (fewer than 20% of English-Spanish bilingual students receiving free lunches) and low ethnic density (less than 66% minority students). Nine schools were considered to be of 'high socio-economic need' (more than 20% of English-Spanish bilingual students receiving free lunches) and of high ethnic density (more than 66% minority students). All of the above schools offered a 90:10 or in exceptional cases an 80:20 programme, where Spanish was the medium of instruction for 80-90% and English for 10-20% of the average week for Kindergarten and Grade one. In later Grades, Spanish continued to be favoured or was used as a medium of instruction equally with English. In Grade two, the ratio remained 80:20 or exceptionally 70:30, in Grade three, it was 80:20, 70:30 or 60:40, in Grade four it was 60:40 or 50:50. From Grade five onward, the language of instruction ratio stood at 50:50. Two of the above schools with high socio-economic need and high ethnic density also offered transitional bilingual programmes which aim to have students shift to learning entirely through English as soon as possible. An additional two schools offering only transitional bilingual education programmes were included in the study. Both of these schools had high socio-economic need and high ethnic density. Finally, two schools offering a 50:50 Spanish and English programme were included in the study. One school had high ethnic density and the other fell two percentage points below the high ethnic density cut off level. The majority of Spanish bilinguals at the 50:50 schools had access to free lunches while the

majority of English bilinguals did not. Finally, the only restriction for programme entry in any of the schools in the study was 'a speech delay' in the students' native language.

Using data from standardised tests for students in Grades one-five and in some cases from Grades one-eight, Lindholm-Leary concludes (2001) that:

- Students who enter school with limited proficiency in English achieve higher levels of English language proficiency in 90:10 and 50:50 bilingual programmes than in transitional (early-exit) programmes.
- Spanish language proficiency of both Spanish-speaking and English-speaking students improves if they are in 90:10 as opposed to 50:50 programmes.
- Spanish-speaking students in 90:10 and 50:50 programmes are equally proficient in English.
- Grade six Spanish and English-speaking bilingual programme students significantly outperform Californian English-only students on standardised Mathematics tests.
- Grade six Spanish-speaking bilingual students score at or close to Grade level in Mathematics tests when compared with nationwide English-only classrooms.
- Students in 90:10 and 50:50 programmes perform equally well on L2 reading tests by the end of Grade 6 irrespective of socio-economic background.
- In upper Grade levels high ethnic density is likely to have a positive effect on the Spanish language proficiency of English speakers.
- Spanish speakers who are required to translate for family and friends have higher scores in Spanish language proficiency.
- Grade five-seven children whose parents took them to Spanish-language cultural events at least two-three times per annum were 45% more likely to be classified as high proficiency bilinguals than were their peers whose parents never took them to such events.
- 100% of children whose parents attended parent club meetings were classified high bilinguals compared with 52% of students whose parents did not attend these meetings.
- In 90:10 programmes students English reading scores lag behind those of students in English-only programmes until the 90:10 students reach Grade three and begin to receive instruction in reading in English.
- The frequency with which parents read to their children is significantly associated with reading test scores in Spanish and English.

- Children of English and Spanish-speaking parents with some college education had significantly higher English language reading scores at the elementary and secondary level than was the case for children whose parents had only attained an elementary or high school diploma.
- There was a significant correlation between L1 and L2 reading scores and mathematics achievement, with the correlation becoming stronger from Grade to Grade.
- A quality bilingual programme can help minority students to believe in their scholastic ability and improve their sense of self-worth and motivation.

These conclusions reinforce previous Canadian findings about student achievement in immersion; however, they point out that students deemed to have high socio-economic need can in many ways be as successful in these programmes as those with low socio-economic need. The richness of these conclusions also suggests that those developing bilingual programmes would be advised to foster an emphasis on reading, the involvement of parents, the out-of-school use of language including having students act as interpreters for family, and the development of the L1 as a tool for L2 learning.

Literature reviews of immersion research

Howard and Sugarman (2001: 1-2), who reviewed two-way immersion programmes in the United States found that the majority of native speakers of Spanish in these programmes could be categorised as having high socio-economic need, as they received free or reduced-cost school lunches. Thus, this type of bilingual provision seems particularly valuable for language minority students with high socio-economic need. Lindholm-Leary and Borsato (2006: 201-202) conducted a literature review and concluded that:

[a]lmost all evaluations of students at the end of elementary school and in middle and high school show that the educational outcomes of bilingually educated students, especially in late-exit and two way programs, were at least comparable to and usually higher than their comparison peers. There was no study of middle school or high school students that found that bilingually educated students were less successful than comparison-group students. In addition, most long-term studies reported that the longer the students stayed in the program, the more positive were the outcomes. These results hold true whether one examines outcomes in reading or mathematics achievement, GPA [grade point average], attendance, high school completion, or attitudes toward school and self.

As the majority of native English speakers did not receive free or reduced-cost lunches they can be considered as generally having lower socio-economic need than the Spanish speakers. A dual language immersion programme may help redress a power balance between primarily English language majority students with higher socio-economic status and primarily Spanish language

minority students with lower socio-economic status. The Spanish students gain status by being more fluent in a minority language that is valued by the school and its students. This would not necessarily be the case in a school where Spanish is not used as a medium of instruction for non-language subjects. Also, it can be concluded that language minority students in the United States benefit from initial instruction in their L1 followed by instruction in the L1 and the L2 (*ibid.*), whilst the amount of time spent learning through English is a less important factor in achievement for language majority students (Genesee, 2004: 552).

Freeman (1998) adds a further layer of nuance to language achievement and issues of power in two-way immersion programmes. In her account of the Oyster Bilingual School in Washington, DC, Freeman (1998: 190) states that ‘all students do master skills in both languages, but [...] the native English speakers’ Spanish is less grammatically accurate than the English of their native Spanish-speaking peers.’ As Spanish speakers are more likely to have some English skills at the start of programming, English-medium classes are used to teach more cognitively demanding content than Spanish-medium classes that initially focus more on language (*ibid.*: 186, 209). Freeman also claims that power and status issues are omnipresent. She details the difficulty in fostering equality between language groups even when there is a community of practice that is focused on fairness. Despite the fact that students ‘work well in diverse groupings in their classes’ and can identify and discuss discriminatory practices, Freeman (*ibid.*: 190) concludes that their social interaction reflects ‘racial, ethnic, and class tensions in mainstream US society.’ This underlines the influence of context, and the need for teachers to work with students so they can build skills in identifying, managing and working through racial, ethnic and class tensions.

Finally, Torres-Guzmán (2007: 58) warns that with the 50/50 two-way immersion model student achievement results are context dependent. Interpreting test results that compare minority and majority language students in two-way immersion programmes is problematic as there is a tendency to test student achievement through English. Also, these tests do not take into account ‘that the availability of resources – structural, policy, instructional, linguistic, human, and financial – are initially asymmetrical [...] in favor of the language majority’ (*ibid.*). In addition, Torres-Guzmán (*ibid.*) reveals that researchers do not always report Spanish speakers and English speakers separately.

Nonetheless, ‘[i]mmersion is one of the most extensively researched aspects not only of languages education but of education more generally’ (Johnstone, 2007: 19). Baker (2006: 248) refers to over 1,000 studies. Research is available from a wide variety of contexts on a wide variety of immersion programmes, and from many countries including Australia, England, Finland, Germany, Scotland, Spain, United States and Wales.³⁷ Johnstone (2002: 38) who conducted an extensive literature review concluded that despite facing an initial lag in learning of content material, in the long-run, most immersion students when compared to most non-immersion peers: ‘suffer no long-term detriment to their scholastic, cognitive or attitudinal development’; and ‘are highly functional

³⁷ Cf. Arnau (1998); Goldenberg (2008); Lapkin *et al.* (1991); Laurén (1997); Mitchell *et al.* (1987); Möller (2009).

in two languages.’ He also suggests that immersion students ‘are fluent and competent listeners but their speech may lack grammatical control and sociolinguistic competence’ (*ibid.*).³⁸ Later studies and literature reviews continue to find that ‘there is no indication that bilingual instruction impedes academic achievement in either’ the L1 or L2 and when a difference in the achievement of bilingual and monolingual groups is found the bilingual group on average shows moderately higher levels of academic achievement (Francis *et al.*, 2006: 397; cf. also Goldenberg, 2008).

Criticisms of immersion programmes

Few studies on immersion have been critical of these programmes. The most high profile of these have been flawed in their design or have drawn erroneous conclusions. Baker and de Kanter (1983) who reviewed immersion-related literature claimed that immersion programmes do not meet the educational needs of US language minority students and that they are in certain circumstances harmful to the learning of English and non-language subjects. Crawford (1999: 112) refers to this as ‘the most quoted federal pronouncement on the education of LEP [limited English proficiency] children, and probably the most criticized as well.’ Willig (1985: 269-317, 313) replicated Baker and de Kanter’s review using 183 coded variables and produced very different results. In 1987, Willig further detailed the flaws in Baker’s (1987) response to Willig’s 1985 article. Furthermore, Colin Baker (2006: 263) points to the narrow focus of Baker’s and de Kanter’s review which only sought to answer whether transitional bilingual education leads to better performance in English and in non-language subject areas. Colin Baker (*ibid.*) states that the study ignored other possible learner outcomes such as ‘self-esteem, employment, preservation of minority languages, the value of different cultures, moral development, identity, social adjustment and personality development.’ In addition, the study placed no value on bilingualism, ignoring its economic and cognitive benefits discussed in chapter five.

However, there are some exceptions where immersion programmes have not been managed in a manner that has led to the expected positive results. Hong Kong is a case in point. In the early 1970s, a rapid shift took place in the education system. Hong Kong moved from offering elite early English-language immersion to a minority of its students, to having 90% of students in 90% of state-funded high schools undertake English immersion beginning in Grade seven. Although the English and Chinese of immersion students improved marginally in comparison with their non-immersion peers, immersion impacted negatively on student achievement particularly in Science, Geography and History, and to a lesser extent in Mathematics (Marsh *et al.*, 2000). Marsh *et al.* (2000: 316) based their conclusions on an extensive study of ‘a diverse sample of [56 secondary] schools broadly representative of Hong Kong.’ There are approximately 400 secondary schools in Hong Kong (Wannagat, 2009)³⁹. The study encompassed 12,784 Chinese-

³⁸ Johntsone (2002: 38) defines sociolinguistic competence ‘as the capacity to use language in ways that are appropriate to context, e.g. talking formally or politely to an unknown adult, [...] or informally to a friend of the same age.’

³⁹ This and all further references to Wannagat (2009) refer to personal communication.

language [Cantonese] secondary students that were followed for three years. Baseline scores for achievement were obtained from tests taken by all Hong Kong children at the end of elementary school in Grade six. Students in the study were tested at the end of Grades seven, eight and nine using English to test those subjects being taught through English, and Chinese for those subjects taught through Chinese.

Based on the 'large negative effects' of teaching Science, Geography and History through English, and a review of literature on immersion, Marsh *et al.* (2000: 337) draw some unexpected conclusions. They claim that if their results are substantiated by other studies, 'a substantial rethinking of the generalizability of the benefits of immersion programs and, perhaps, bilingualism and second-language acquisition for high school students' is required. They claim that the Hong Kong late immersion programme met Swain and Johnson's (1997: 8) criteria for immersion programmes, which include the requirement for teachers to be bilingual. However, they do not define the term 'bilingual' or offer any evidence that the immersion teachers in Hong Kong were highly proficient in English. Marsh *et al.*, (2000: 337) do state that 'having a particularly strong emphasis on English in English Classes can offset some of the negative effects of Instruction in English in non-language subjects'; however, they do not analyse whether or how content teachers teaching through English support language learning. They deny the possibility that the quality of teaching could be at the root of the problem by stating that '[i]f quality of instruction was the critical variable, it seems unlikely that [...] the negative effects in mathematics should be so much smaller than those in history, geography, and science' (*ibid.*: 341). Mathematics, as Marsh *et al.* (2000: 335) concede, may well consist of a language of symbols that could have been acquired prior to entry into the programme. Yet, Marsh *et al.* seem to be assuming that it is possible to simply switch the language of instruction without understanding that good teaching would involve properly scaffolding both the content and language.

Hoare and Kong (2008)⁴⁰ and Kong (2008)⁴¹ also explore the negative effects of late immersion on student achievement. They argue that this is a result of context. They refer to data gathered prior to and after the re-establishment of Chinese sovereignty over Hong Kong in 1997 showing relatively similar results. From 1998 onward only 25% of Hong Kong high schools were allowed to offer late immersion (Kong, 2008: 3). This 25% constitutes the majority of the best schools in Hong Kong (Wannagat, 2009). Although the situation has improved in recent years with an increased use of English in immersion classes, 'some teachers do not use English consistently in class' and 'many do not insist on spoken English by students as much as they should', as they are more concerned about examination results than English language development (Hoare and Kong, 2008: 248). Teachers often do not provide the necessary scaffolding for working with English-language materials which has had a decidedly negative effect on comprehension and learning (*ibid.*: 248 referring to Kong, 2004). Hoare and Kong (2008: 254) conclude that 'many Hong Kong immersion teachers do not have the pedagogical skills, nor the understanding of

⁴⁰ Cf. Hoare and Kong (2008) referring to Johnson (1997), Marsh *et al.* (2000) Hoare (2003), Yip (2003), Kong (2004).

⁴¹ Cf. Kong (2008) referring to Yip *et al.* (2003), Hoare (2003, 2004), Tsui *et al.* (2004), Lin (2006).

and the commitment to immersion education, to integrate the teaching of language and content in the classroom in ways that can bring about the learning of both.’ In part, Kong (2008: 6) and Wannagat (2009) attribute this to a general lack of immersion-specific teacher pre-service and in-service training.

Commenting on the Hong Kong government’s 1998 curtailing of access to immersion programming, So (2002: 222) suggests that due to the demand for this form of instruction, it makes more sense ‘to spend greater efforts and more resources to increase the supply of its [bilingual education’s] authentic and appropriate form rather than confining it to a few.’ In fact, in 2008 under increased pressure from schools and parents, the Hong Kong government relaxed restrictions on programming permitting schools to use English as a medium of instruction for up to 25% of instruction (Wannagat, 2009).

The Hong Kong late immersion initiative demonstrates how a desire for access to a high prestige language such as English can lead parents and an entire education system to launch programming without adequate preparation. This case underlines how important it is to understand context and to properly manage immersion programming. The Hong Kong experience suggests that stakeholders need to understand the dynamics of bilingual education before launching large-scale programming. This would involve building expertise in, among other things, planning, working with parents, and training teachers and school managers to ensure that they have the needed language skills, sufficient understanding of how to integrate content and language teaching/learning and of how to avoid the negative impact of high stakes examinations. Above all, large-scale initiatives, which are more complicated to manage than small-scale projects, are best approached with particular care.⁴²

Content and Language Integrated Learning (CLIL)

Even more limited forms of bilingual instruction appear to have a positive effect on learning. Van de Craen *et al.* (2007) studied children in Dutch-medium schools in predominately French-speaking Brussels who had been taught 10% of the curriculum through French for the first four years of primary school. The study involved three CLIL schools and one control school. The children in the control school were matched for age, socio-economic status, and language background (Dutch speakers, French speakers, speakers of other languages). The students were administered a Mathematics test that consisted of 9 subtests (*ibid.*: 193 referring to Dudal, 2002). One CLIL school taught Mathematics through French, while two did not, choosing instead to teach Crafts or Environmental Sciences. The subject contents had not been previously or concurrently taught through Dutch. Van de Craen *et al.* (*ibid.*: 193) found that ‘CLIL pupils outperform non-CLIL pupils’ on ‘nearly all subtests’, that this was ‘true for all schools’ even the two not teaching Mathematics through French, and that the more verbally the tasks were

⁴² Cf. Ong (2010: 92) who discusses Malaysia’s decision to phase out the teaching of Mathematics and Science through English due to pressure from Malay, Chinese and Tamil communities.

phrased, 'the more remarkable the difference between the experimental and the control group.' The language background of the pupils was not found to be a significant variable. Van de Craen *et al.* (*ibid.*) conclude that 'an enriched language environment seems to have a positive effect on learners' cognitive abilities as they are measured by a standard mathematical test', and this confirms teachers' reporting that CLIL pupils 'have a better knowledge of abstract concepts.'⁴³

In his review of CLIL programmes in Germany, Wolff (2002: 66) states that, in principle, any child can enrol in a CLIL programme, however, in practice 'secondary schools try to form CLIL classes with only the most gifted children or at least what they believe to be the most gifted.' Wolff (*ibid.*) bases his claim on demographic data showing that immigrant children are underrepresented in CLIL classes, while the 'children of well-to-do parents are in the majority.' Even if CLIL tends to draw on the elite, it does not mean it is not suitable for students from more modest backgrounds. Whittaker and Llinares (2009) studied two classes of 11-12-year-olds in their first year of the 4-year cycle of obligatory secondary education. One was a CLIL History class and one a CLIL Geography class in socio-economically different areas of Madrid. They found that for both groups the 'students' written production' is similar to that found in English language [non-CLIL] classes in the final years of schooling' (*ibid.*: 231-232). Furthermore, Lasagabaster (2008: 37) suggests that in 'regular foreign language courses students whose parents had enjoyed greater educational opportunities usually obtain better scores in the second/foreign language, but this seems not to be the case once a CLIL approach is implemented'. CLIL appears to have other advantages as well. Sylvén (2006: 50) studying nearly one hundred 13-14-year-old students in Sweden found that CLIL may lead to a greater use of the language outside of the classroom. CLIL students are known 'to lack speaking-angst' (Dalton-Puffer, 2009: 212) and may thus feel more at ease in using the language outside of the classroom.

However, it is possible that CLIL students, who self-select, simply have a special interest in the CLIL language. Other explanations are also possible. Agustín Llach (2009: 123), who studied 11-12-year-old CLIL students in Spain, speculates that for CLIL students communication with the teacher is rather 'an exercise in communication rather than a language task'. This gives credence to the argument that CLIL fosters authentic communication. Beardsmore (2008: 9 referring to Muñoz, 2002) explains that CLIL teachers invest greater effort into contextualising and making information more accessible, while permanently undertaking comprehension controls. He suggests that this increases opportunities for teacher-student dialogue, and deeper order analysis and understanding of content than would be the case when studying through an L1.

However, researchers have also suggested that CLIL presents challenges to educators. Sylvén (2007: 244-245) has ascertained that although teachers feel that there is a lack of appropriate CLIL materials, they are not likely to compensate for this by using non-traditional materials such as blogs or Internet chats. This is problematic on several levels, as teachers are more likely to hold less recent information than their students, be less in tune with their students' interests, and

⁴³ Cf. Jäppinen (2005: 163) who draws a similar conclusion based on a study of 335 CLIL and 334 non-CLIL learners aged 7-15 in three Finnish cities.

are not as likely to access vast teaching and learning resources now available free of charge on the Internet through dozens of sites supporting CLIL teachers.⁴⁴ In Spain, Fernández Fontecha (2009: 15) observed as ‘a common tendency’ that there are ‘serious inconsistencies between what is required of [...] teachers in most CLIL programmes, what should be required of them and the type of training they receive.’

Conclusion

Bilingual education has the potential to support students in becoming bilingual and biliterate. Despite the complexities involved, prestigious bilingual education including early, delayed and late (one and two-way) immersion programmes have been shown in the long run to help students: to learn to speak, read, write and understand the L2 with considerable proficiency with no cost to their L1; to achieve academically in a wide range of subjects on a par with students studying through their L1; and to develop greater understanding of the L2 culture(s). In addition, research demonstrates that bilingual education is suitable for academically less inclined students and for students from various social classes. However, high student attrition rates in Canadian early immersion programmes point to a need to offer quality immersion programming at the secondary and tertiary levels in order to provide for an authentic outlet for learning acquired during Grades one-eight. There is also a need to discuss students’ beliefs and expectations about immersion. In addition, particular care needs to be taken by schools to ensure that all teachers have and apply the skills needed to maintain high expectations regarding grammatical accuracy and language growth when teaching through the L2. Despite the benefits of even low levels of bilingualism, as discussed in chapter four, the market may seek very high levels of bilingualism. Furthermore, in order to develop language over their lifetime and to overcome intercultural barriers students are likely to benefit from increased support in building networks for using their L2 with native speakers of that language.

Despite the potential of immersion programmes, they remain highly context dependent. Canadian parents, who played a key role in launching the immersion movement, had to overcome considerable resistance to programming from local authorities. Parents also had to help authorities find teachers. These parents struggled with local authorities for years, before immersion eventually became a widely accepted and integral part of the education system. Intuitive understandings by authorities, as well as among majority and minority populations in several countries have been seen to run counter to research evidence, and lead governments to limit access to bilingual education despite the fact that a considerable body of research points to the benefits of this form of education, and in certain contexts, to the harm caused by denying access to such educational provision. Authorities can also cancel programmes, instead of seeking to improve them and meet demand. This reinforces the conclusion from the previous chapter that bilingual education always operates

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Cf. CLIL Cascade Network (2010) for a list of websites.

in a broader ecology of power sharing or power struggles. This is the case, even in successful programmes.

Although diverse contexts can present diverse problems and obstacles to programming, contexts can be shaped with some measure of certainty by knowledgeable stakeholders, as was the case in St. Lambert, Canada. In addition, a more limited provision of classes taught through the L2 such as certain forms of CLIL hold the potential of contributing to student learning of languages. As the features of successful immersion programmes could potentially guide stakeholders in building quality immersion programming, these features will be discussed in the next chapter.

CHAPTER EIGHT: FEATURES OF SUCCESSFUL IMMERSION PROGRAMMES

A considerable body of research suggests that numerous cognitive and economic benefits are potentially more readily available to bilinguals than monolinguals. Under the right conditions and with the appropriate investments, students in immersion (partial, total, and one and two-way immersion, and dual language) programmes generally achieve high levels of proficiency in their L1 and L2 at no cost to long-term academic achievement. Thus, if high quality immersion programmes have been successful in fostering content and language learning, it is important to identify those features which are associated with their success. This chapter discusses those features.

Research pertaining to headteacher leadership and management, and pedagogy in immersion programmes are the two primary foci of the chapter. Taking the view that the management and pedagogical complexities of bilingual education cannot be fully disentangled from the complexities of education in general, professional literature about best practice in education and its management is also drawn into the discussion. With respect to pedagogy particular attention is given to learning, and the role of language and autonomy in learning. The potentially negative impacts of immersion are described, as are ways leaders and/or managers can work to reduce these within their schools and communities at large. Connections are made to my experience of working with stakeholders to establish the Estonian-language immersion programme.

Integrated competences in management, leadership and pedagogy

For Lindholm-Leary (2001: 59-60) effective leadership in dual language education can be analysed at two levels: '(1) administrative and principal [headteacher] support; and, (2) instructional leadership.' This underlines the need for integrated competence in leadership, administration and in pedagogy. Lindholm-Leary (*ibid.*: 60) considers it important that the headteacher 'understands the language education model, truly supports its implementation [...], and understands the program well enough to explain it to others.' This text implies that a headteacher must understand and support programme implementation, and be an ambassador for the programme. However, there are two concerns that arise for the reader – one relating to an overemphasis on language, and the other relating to the breadth and depth of knowledge required by a headteacher to lead these programmes.

First, Lindholm-Leary speaks of a ‘language education model’. Dual-language and immersion education are more than language education models, they are first and foremost education models. The immersion discourse is heavily language oriented. According to Fortune (2008)⁴⁵, research has long ago shown that effective immersion programmes do not impede content learning, so researchers have refocused on language learning. This shift has also been driven by research pointing to the widespread grammatical and lexical inaccuracies in immersion students’ L2 use (Harley *et al.* 1990: 15, 16, 23). Gajo (2007: 563) says this has led researchers away from a ‘subject to a more integration-centred perspective’ with a view to improving student’s L2 language proficiency, and teaching.

Although the professional discussion is shifting towards emphasising language learning in immersion, subject teachers as opposed to class teachers in nations as diverse as Singapore, Canada, Estonia and the United States have difficulty in seeing themselves in the dual role of content and language teacher.⁴⁶ It has also been suggested that the average language teacher does not see her or himself as a teacher of non-language content. Furthermore, Lucietto (2010: 346) cautions that even in cases where secondary school language teachers are acting as content teachers, lesson observations demonstrate that some of these teachers are continuing to teach above all language while using content-based themes.

Second, there seems to be some confusion in Lindholm-Leary’s comments (*op. cit.*) as to the level of knowledge required by a headteacher to provide effective administrative support and instructional leadership. The level of knowledge required to ‘explain [the programme] to others’ is far more limited than is required to navigate stakeholder concerns in immersion education, to build a learning community with stakeholders, and to support effective programme implementation and student learning. In fact, Lindholm-Leary (2001) herself paints a much more complex picture of dual language education than is suggested in her previous remarks. She implies that headteachers in immersion actually require a wide and in-depth knowledge of best practice in leadership/management and teaching/learning. It is noteworthy that Lindholm-Leary and other researchers working in this area appear to conflate the terms management and leadership.⁴⁷

Headteacher commitment and language knowledge

Cloud *et al.* (2000: 12) argue that programme leaders need to be ‘[w]ell-informed and committed’, and ensure ‘the adoption and rigorous implementation of challenging standards in all curriculum

⁴⁵ Personal communication.

⁴⁶ Cf. Fortune *et al.* (2008: 89) referring to Silver (2003); Gajo (2007: 578); Genesee (2008: 34); Mehisto (2008: 98-99).

⁴⁷ In this thesis, the term leadership subsumes the term management, and vice versa. Leadership is taken to include: establishing vision and direction; empowering and inspiring others; and, building teams and coalitions. Management includes: planning and budgeting; organising; and, establishing procedures (Northouse, 2001: 10).

domains.’ Met and Lorenz (1997: 244) expect that commitment to be ‘wholehearted’. A strong level of commitment would imply a strong belief in the programme, and being well-informed implies in-depth knowledge about how schools establish and support the achievement of rigorous standards in all domains including content and language learning. Carmody (2005: 55), a former Canadian headteacher, argues that it is essential that the headteacher ‘believes in immersion as an effective process for teaching a second language’. Although Carmody (2005: 53-73) writes of the importance of maintaining high expectations in school in general, he prioritises issues related to language rather than content learning. As with subject teachers and researchers, headteachers may also find it difficult to maintain a dual focus on content and language. The fact that a large percentage of headteachers in immersion schools in some countries do not speak the immersion language (Locke, 2004: 3; McConnell, 2010⁴⁸), and thus may lack successful personal experience in becoming bilingual, may be a factor that makes it difficult for them to fully support teachers in maintaining a balanced focus on content and language learning.

However, Met and Lorenz (1997: 244-245) suggest that monolingual headteachers can use strategies such as relying on a bilingual deputy headteacher, and that they may be excellent programme advocates as they appreciate the ease with which immersion students acquire language. Thus, not only do headteachers need multiple competences and the capacity to draw on several of these simultaneously, they may also need to recognise and compensate for their current lack of skill or knowledge. However, this calls for a high level of self-awareness and the ability of stakeholders to discuss understandings in an open and frank manner. Hamayan *et al.* (2007: 185) suggest that ‘[t]he beliefs, attitudes and values that each of us holds [...] make it easier or more difficult for us to build new knowledge.’ As discussed in chapter three, despite enjoying stakeholder support and having been engaged by stakeholders in open and frank dialogue, a monolingual Estonian headteacher’s regular focus on late immersion programme difficulties in his school led him to cancel the programme, only to have it successfully relaunched by the headteacher that succeeded him.

Building informed stakeholder support and avoiding pitfalls

In addition to being supportive of a bilingual programme, headteachers are advised to determine existing levels of stakeholder support for and knowledge regarding the programme. Lindholm-Leary (2007: 18) argues that a headteacher ‘cannot assume that all teachers who have a bilingual credential have current knowledge of, understand, or support the dual language program.’ This echoes Hoare and Kong’s (*op. cit.*) conclusions about teachers in the Hong Kong late immersion programme. In addition, immersion programme parents may not fully support programming (Carmody, 2005: 55). Parental motivations for placing children in immersion may be varied and have implications for both bilingual and non-bilingual education. For example, parents may have chosen immersion not simply to ensure that their child becomes bilingual,

⁴⁸ Personal communication. McConnell is a former President of the Ontario Modern Language Teachers’ Association.

but because they believe that fewer numbers of students in these programmes have behavioural problems, special needs or difficulties in learning (Willms, 2008: 2-3). This echoes earlier research findings that these programmes are often perceived of as elitist (Safty, 1992: 26).

Similarly in Estonia, as Immersion Centre staff worked to convince parents and educators of the merits of immersion, they had to counter a widespread perception that immersion was only suitable for high-achieving students (Käosaar, 2010).⁴⁹ Moreover, it was necessary during stakeholder dialogue, and during programme planning and evaluation, to maintain a multi-year focus on avoiding elitism in order to prevent it from gaining ground. The first sign of ‘creeping elitism’ occurred right at the start of the Estonian programme in one school that selected students for early immersion despite having committed to admitting students on a first-come-first-served basis. Immersion Centre staff feared that if the programme in some schools became elitist, it would place the entire programme at greater risk of criticism and cancellation (*ibid.*). Moreover, it was assumed that high-achieving students would learn Estonian anyway, and that immersion could prove particularly helpful to students with average levels of achievement. Other jurisdictions have succeeded in ensuring a balanced intake, suggesting that this is a realistic goal. For example, in the four Canadian provinces of Quebec, Manitoba, Saskatchewan and British Columbia there is ‘no real difference in the average family background of immersion and non-immersion students’ (Statistics Canada, 2010).

If schools offering immersion enrol a disproportionate number of students who are deemed high ability and of high socio-economic status (SES), this might undermine other programmes in their own school and in other neighbouring schools. This could lead to higher numbers of students with special needs concentrated in non-immersion programmes. Willms (2006: 51) suggests that ‘when low SES or low ability students are concentrated in particular schools, it is difficult to maintain high expectations, establish a positive disciplinary climate and attract and retain talented teachers.’ Thus, since bilingual education operates in a larger ecology than one school, it also creates a larger ecology of obligation. Hopkins (2007: 169) argues that moral leadership in education does not allow improvement at one school to be sustained at the expense of another. A headteacher taking this broader view would seek ways of balancing the needs of his or her school’s immersion programme with the educational needs of the community at large. However, the issue is further complicated by research regarding PISA⁵⁰ scores from across dozens of countries which suggests that when students who are perceived to have low ability or who come from lower socio-economic groups, are concentrated together in schools their achievement declines, while concentrations of high ability and socio-economically more favoured students experience improved performance (Willms, 2006)⁵¹. In order to serve the interest of all students and the community at large, this would suggest that a headteacher should not only have the capacity to help

⁴⁹ Personal communication. This is also the case for further references to Käosaar (2010). Currently, Käosaar is Head of the General Education Department at the Estonian Ministry of Education and Research.

⁵⁰ The Programme for International Student Assessment (PISA).

⁵¹ Cf. Willms (2006: 47) referring to Brookover *et al.* (1978), Henderson *et al.* (1978), Rumberger and Willms (1992), Shavit and Williams (1985), Willms (1986).

stakeholders embrace an inclusionist philosophy of action, but that immersion schools are able to support all students, including high-achievers, in working to realise their individual potential.

Nuanced understandings appear to be a hallmark of immersion education. This applies as well to stakeholder understandings which are likely to be on a scale from well-informed to ill-informed. Stakeholder support is also likely to be located on a continuum from complete support to complete rejection rather than being polarised at either end of the scale. Support may change over time. For example, parents' support for immersion often dips during the second year their child is in the programme (Lindholm-Leary, 2001: 167). Thus, there is value in headteachers having the skills and the habit of mind to explore regularly stakeholder understandings and levels of support.

Supporting informed stakeholder decision-making

False beliefs about bilingual education are common currency (de Bot, 2009). Beliefs and feelings are often misconstrued as facts (Sachdev and Wright, 1996: 237, 243). Being able to recognise thinking patterns and distinguish these from feelings is central to reasoning, and to managing a discussion about the emotionally charged and myth-laden domain of bilingual education. Slovic *et al.* (2004: 311) claim that 'analytic reasoning cannot be effective unless it is guided by emotion and affect.' Yet in exploring the link between facts, feelings and decision-making, Kahan *et al.* (2007: 5) found that individuals subconsciously resist factual information about an imminent and well-documented risk '[a]s a way of avoiding dissonance and estrangement from valued groups': people are more often guided by worldview than by facts. Similarly, Kahan and Braman (2006: 148) suggest that 'cultural commitments are prior to factual beliefs on highly charged political issues.' Thus, it is important for a headteacher to be able to influence people on both an affective and factual level. Instead of simply listing facts, parents are more likely to make a decision supporting bilingual programming if they see other parents speaking about the programme in a positive light.

In Estonia, Irene Käosaar and I arranged for prospective immersion parents to meet with immersion students and their parents, with local government officials who were ethnic Russians, and with researchers. Having representatives of the prospective immersion parents' own cultural group and authority figures respected by that group speak positively about immersion appears to have catered to what Kahan and Braman (2006: 148, 150) refer to as 'cultural cognition' – the act of conforming one's factual beliefs (what one believes to be a fact) to one's cultural evaluations. A meeting with parents of immersion students was a means of associating positive emotions regarding the programme with the prospective immersion parents' cultural group. Haslam *et al.* (2004: 7) point out that in-group presenters of information 'share the same social perspective as the perceiver and hence are seen to be more qualified to inform him or her about social reality.' In addition, we presented the programme as being additive in nature, meaning that it would leave the students' Russian language and identity intact. We also avoided challenging parents' worldviews by refraining from conversations about Estonia's wartime and post-war history, instead concentrating discussions on creating value for children

(Käosaar, 2010). This was a way of creating ‘alliances with certain mainstream discourses in order to counter other [often unstated parental] mainstream discourses’ (Doerr, 2009: 45-46).

Cohesion and collegiality: integrating programming

Furthermore, Lindholm-Leary (2007: 26) calls on bilingual programme leaders to act as programme advocates and liaisons. Lindholm-Leary (*ibid.*) expects a leader to supervise programme ‘development and planning, and coordination’, as well as act as a facilitator ‘of staff cohesion, collegiality, and development.’ In writing about ‘cohesion, collegiality and coordination’, she stresses the importance of ensuring that teacher training is meeting student and teacher needs, and that training is aligned with programming goals and strategies (*ibid.*: 26-27). Although parent education needs are mentioned (*ibid.*: 36), the training needs of other school internal stakeholders such as deputy headteachers, librarians, support staff, or the training needs of school external stakeholders such as inspectors, financial planners or other government officials are not thoroughly discussed. All of these stakeholders can influence the programme, and thus, they need to be aware of how their work can support or impede programming.

Furthermore, having the knowledge and skills needed to foster cooperation is insufficient, if that cooperation is not effective or teachers do not feel supported. A Canadian study on teachers who have resigned from immersion programmes suggests that although novice teachers (with five or less years experience) appeared able to cooperate with their colleagues, they did ‘not necessarily ask for their help when facing a problem’ (Karsenti *et al.*, 2008: 61). The fear of being judged by headteachers and other colleagues may be preventing teachers from asking for help (*ibid.*). The study also points out that teachers are most likely to resign during the first five years of teaching, with half of these teachers resigning during the first two years. In contrast, Ewart (2009) found that schools hiring university graduates who had undergone experienced-based pre-service training, and that provided these new immersion teachers with mentoring whilst also sharing resources and offering support from administrators had high levels of teacher retention.

In addition, it is not just the teachers teaching through the L2 that require professional development and support. In Estonia, the Immersion Centre offered non-immersion teachers training in order to allow them to benefit from the programme, to build their support for it, to increase the likelihood that they made best use of the limited time now available for teaching through the students’ L1 (Russian), and to support the integration of the standard and immersion programmes and their pedagogical practices (Käosaar, 2010). A shortage of training opportunities for non-immersion teachers at the start of the Estonian programme contributed to a situation where in one school students who were used to a student-centred approach in immersion ‘clashed’ with those non-immersion teachers who were used to a more teacher-centred approach (Kebbinau, 2003).⁵²

⁵² Personal communication. Kebbinau reported that after her class of immersion students moved into Grade four they began to be taught several subjects through their L1 by other teachers. Cf. also Bishop *et al.* (2010: 21) for a discussion of the potential negative effects on students of not including all the teachers in a school during a reform effort.

There is a tendency for immersion schools to develop a two-schools-in-one phenomenon where teachers working through the learners' L1 and L2 form two separate and possibly oppositional work cultures (Carmody, 2005: 57; Banfi and Rettaroli, 2008: 160). If responsibility is assumed collectively for avoiding this state of affairs, immersion teachers would be expected to be supportive of standard programme colleagues and vice versa. This might require a conscious effort on behalf of some immersion teachers who share a unique professional bond to make certain that they integrate with all staff and that they do not, for example, always sit together at meetings or in staffrooms (Little, 2000).⁵³ As Fullan (2001: 51-76) stresses, building effective relationships is at the heart of any educational reform effort.

In addition, building one coherent and integrated set of programmes in a school requires integrating the immersion concept into the various school planning instruments, including strategic and work plans, curriculum documents, and vision and mission statements. It implies a high level of knowledge and skill in planning and in the use of 'group decisions support' systems (Huxham, 1996: 143), such as results and effects-based planning frameworks. Inclusive planning processes build programme support, help incorporate various stakeholder views and understandings, and make visible for all stakeholders the planned outcomes, as well as necessary activities and investments for achieving those outcomes. Howard *et al.* (2007: 51-100) stress that this planning process requires two-way communication and sufficient time, and other resources including investments into research.

Complexity

Instituting an immersion programme is a multi-year change initiative. Lemke and Sabelli (*ibid.*: 120), who have studied complex systems and educational change, conclude that sustainable educational change involves: a) 'the need for a match between stakeholders' expectations regarding the nature and pace of results'; and b) 'the ability to provide persuasive demonstrations of timely effects.' Thus, not only is stakeholder involvement necessary in the planning process to ensure stakeholder expectations are reflected in planning documents, but stakeholders need to be informed about programme progress. This gives credence to Howard *et al.*'s (*ibid.*) proposal that bilingual schools need data collection systems that provide clear, user-friendly information on how data was obtained and how to interpret it. In addition, Montecel and Cortez (2002: 9-11, 13, 15) argue that stakeholders also need 'to know the rationale and the critical components of bilingual [...] programs'. However, Howard *et al.* (2007: 74, 93) stress that for this to happen, both languages and those involved with them must share power, with equality of influence being reflected in school budgets, student inclusion, the sharing of resources, and the equal and respectful visibility of both cultures in learning materials.

⁵³ Personal communication from Olga Little who was a headteacher of a Canadian immersion school and a teacher trainer.

Howard *et al.* (2007: 51-100) place much of the onus for working with stakeholders on schools. In Estonia, the onus fell both on the Immersion Centre, which was mandated to coordinate programming, and on schools, but eventually on many other stakeholders as well. Mehisto and Asser (2009: 84) who researched early immersion programme management in Estonia, report that headteachers and their deputies considered that, from a managerial perspective, centralised programme coordination by the Immersion Centre was 'the most significant factor contributing to programme success.' Bolger (2005: 28), writing about the Canadian context, also stresses the need to coordinate bilingual programmes regionally and/or nationally, as do Banfi and Rettaroli (2008: 166) in the South American context. Montecel and Cortez (2002: 11) who researched promising and/or exemplary bilingual education in ten American schools concluded that all reported 'strong support from someone in central office for their program'. This support was characterised by strong leadership and respect of the bilingual programme that included clearly articulated roles for central office staff and frequent communication with the school (*ibid.*). Howard *et al.* (2007: 100, 76, 99) also argue for 'equitable access to state, district, and school resources' and for district, regional or state level collaboration of teacher and staff training programmes, and for coordinated partnering with professional regional, state or national organisations.

The role of language

In addition to management/leadership practices that are central features of successful immersion programmes, it is important for those implementing these programmes to possess an understanding of the pedagogical principles and classroom practices that foster learning. Language plays a particular role in immersion programmes as an object of learning and as a means for learning. Language is a systematic means of communicating facts, ideas, beliefs or feelings through the use of conventionalised signs, sounds, gestures, or marks that are culturally bound and that have commonly agreed meanings. Learning a language is a complex task. For example, Crystal (1995: 426) explains that learners of English need to learn: some 50,000 words for active use; an additional 25,000 for passive use; hundreds of ways of using pitch, tone, loudness, speed and rhythm; a large number of grammar rules; and, conventions of language use that are tied, among others, to region, gender class and occupation. These conventions inform us of when, whether and with whom we can speak, and the sort of language we are expected to use in doing so (Harris and Cronen, 1979: 12). In addition, gesture combined with speech (an external manifestation of language) 'may form an integrated system of communication' that is far from fully understood (Kelly *et al.*, 2007: 223) and that a language learner needs to be aware of and use in a knowledgeable manner.

In addition, language 'is bound up with culture in multiple and complex ways' representing shared beliefs and attitudes and a common stock of knowledge (Kramsch, 1998: 3). For example, the word 'blue' represents sadness in English-speaking countries, but happiness and peace in Cameroon and Nigeria, and indicates that one has had too much to drink in Germany (Finkbeiner and Koplin 2002: 7). Guugu Timithirr speakers speak of someone's brother standing to the south-west of them and the salt on the table being to the north of them instead of using more relative

terms such as to the left or in front of (Wood, 2009: 116 referring to Monastersky, 2002). In the learning of school content subjects language reveals ‘how science is done, how history is constructed, or how narratives are told’ (Schleppegrell *et al.*, 2004: 68).

Moreover, ‘language, communication and cognition [...] are mutually inextricable. Cognition and language create each other’ (Ellis and Robinson, 2008: 3). From a Vygotskian perspective, language is not simply a tool for communication, it is a tool for creating knowledge⁵⁴ through ‘socially shared cognition’ (Kasper, 2008: 59-77), and for honing thinking (Vygotsky, 1978). Thus, thinking does not simply occur in a vacuum, but requires input from and interaction with others. If language assumes a double function ‘as a means for communication and a tool for thinking’, it is also possible to view both L1 and L2 interaction as tools for learning and as competences in their own right (Kasper and Rose, 2002: 33). In bilingual education, one is faced with the particular difficulty of helping students with limited L2 language skills to learn both the language and use the language to think about and analyse complex content concepts. To consciously manage these language and thinking tools teachers teaching through an L2 need to develop not just awareness of language but of communication, and how both of these are tied to cognition.

Communication awareness and cognitive engagement

Communication systems in classrooms are in large part set up by teachers and they shape ‘the role that pupils can play, and [...] the kinds of learning they engage in’ (Hodgkinson and Mercer 2008: xii referring to Barnes, 2008). According to Mercer and Dawes (2008: 57), in many classrooms there is an asymmetry between teacher and student-talk with teacher talk dominating. Furthermore, many teachers use ‘teacherese’, a register of language whose dominant functions are associated with ‘management and control, and to encourage reasoning’, but not dialogue (Hopwood and Gallaway 1999: 175). Mercer and Dawes (*op. cit.*) argue that teachers over- and mis-use the ‘initiation-response-feedback (IRF) pattern’ – asking a question, listening to a response and providing some form of feedback/evaluation (Sinclair and Coulthard, 1975: 21). These exchanges are also common in bilingual education (Lyster, 2007: 89-92). Although IRF exchanges can be used as a dialogic tool to build a narrative leading to a common understanding of intended learning, they can also demotivate and disempower students if they imply that only teachers ask questions without seeking permission and only teachers evaluate the student answers (Mercer and Dawes, 2008: 57-65). Restricted opportunities for students to engage in meaningful dialogue may lead to a decline in student engagement in the learning process. Yair (2000: 252, 254, 256) who studied 865 students in 33 schools concluded that students were engaged during lessons for ‘only 54 percent of the time’ with student self-reported engagement during teacher lectures standing at 54.6% compared with 73% for group work. Finally,

⁵⁴ For the purposes of this thesis knowledge in language learning and in education is defined as ‘mental, internal representations and processes located in the individual mind.’ (Kasper, 2008: 59). Knowledge is emergent and relational in nature. It consists of ‘the content and organisation of memory, perception, attention and consciousness’ and it is dependent on learning (*ibid.*).

during teacher-student exchanges, it is common for teacher questions to concentrate on the factual without fostering higher order thinking (Echevarria, 2004: 88 referring to Gall 1984).

The underuse of the potential of talk and higher-order thinking restricts opportunities for students to reveal the gaps in their current knowledge base, thinking, and language use, as well as to 're-arrange their thoughts' and to search for and use language to express those rearranged thoughts, and to take greater charge of their own learning (Barnes, 1976: 108). This leads to a reduced sample of student language and verbalised thoughts which a teacher could use to assess teaching and learning needs with an increased potential for uninformed teacher decision-making. By giving less public space to student thinking, an opportunity is also lost to accord it and the students greater status and to recognise their value. Restricted use of student language may also undermine the status of student-produced language. In the above circumstances intended learning is impeded or becomes less meaningful.

Barnes (2008: 5) proposes having teachers increase the use of exploratory talk where the focus is on the speaker 'sorting out his or her own thoughts.' Mercer and Dawes (2008: 64) suggest teachers foster exploratory talk by: allowing (during whole class discussion) a series of student answers before any evaluations are made; asking students to explain their reasoning; linking teacher definitive explanation to students' previous explanations; discussing how work proceeded and asking students to suggest new rules for working; and, having students choose who will speak. In a similar vein, Alexander (2010: 306) suggests that effective teaching is 'dialogic' and, when seeking 'to exploit the true potential of talk', classroom practice is: collective (teachers and students working together); reciprocal (teachers and students listen to each other and share ideas); supportive (free of fear, building common understandings); cumulative (building on each other's ideas to create a common line of inquiry); and, purposeful (focused on meeting visible educational goals). Communication awareness has the potential of increasing student engagement and participation in meaningful dialogue. In bilingual education where student L2 use may be largely limited to the classroom this takes on a particular importance.

Obstacles to student engagement in communication: high expectations

Teacher beliefs may lead them to restrict opportunities for low-achieving students to access exploratory talk (Solomon and Black, 2008: 75-88). Similarly, Nuthall (2005: 920, 924) argues that even teachers who are considered by administrators as exemplary, are likely to make false assumptions about the level of engagement in learning of both high and low-achieving students, about their capacity to learn, about levels of existing student knowledge, and that these teachers may lack the skill to involve the majority of their students in active discussion and learning. In particular, low teacher expectations may negatively affect students from low socio-economic and minority language backgrounds (Cloud *et al.*, 2000: 12). Yair (2000: 256) asserts that low-achieving students are more likely to be mentally disengaged during lessons and that their

alienation correlates with low levels of achievement. Similarly, Cloud *et al.* (*op. cit.*) express a concern that ‘students who are held to lower standards and are not given the opportunity to learn to higher standards of achievement cannot realise their full learning capabilities’: educators in bilingual education need to ‘believe that all students are capable of high levels of achievement.’

If beliefs regarding students and learning are not discussed in schools, it is more likely that some staff will have low expectations vis-à-vis some students. Teachers ‘need opportunities to theorise their teaching’, and to discuss and adjust their feelings, beliefs, understandings, and practices (Hardman, 2008: 147). For Janks and Locke (2008: 42) critically reflective discourse practice ‘is the key to educational transformation’. Thus, if teachers do not raise their meta-cognitive and meta-affective awareness through discussion, they will be less likely to consciously manage their beliefs and the impact of those beliefs on students and a school’s ethos. As an additional counter-measure to low expectations, Baker (2006: 316) proposes building high expectations for all through a conscious effort to embed a ‘can do’ mentality into the school ethos and by ‘involving students in decision-making’. On a practical level, this implies that learning environments support students in working in their Zone of Proximal Development (ZPD): building on their current understandings students in their ZPD reach beyond what they could do on their own by having access to the support of peers and adults (Vygotsky, 1978: 87). Furthermore, drawing on the National Assessment for Educational Progress study of 9-year-olds in the United States and PISA scores for 15-year-olds from 32 countries, Guthrie (2004: 5) argues that low SES students ‘can overcome traditional barriers to reading achievement, including gender, parental education, and income’ through engaged reading. Guthrie (2004: 3) that engagement includes thinking critically about the text, writing about it, and using learning strategies to cope with the text and gain new knowledge from it.

Further bringing to light some of the complexities associated with encouraging and supporting all students in meeting high standards Cloud *et al.* (2000: 10) state that in bilingual education ‘it is not enough that standards be clearly defined and challenging, they must also be (a) understood, (b) accepted, and (c) implemented in a coherent fashion by all educational and support personnel in the program.’ If expectations need to be stated, understood and implemented in a coherent fashion, this also implies that language and content goals should be established and discussed among teachers and in all classes with students. Without this discussion, these goals could not form a coherent whole. Moreover, for students to be able to achieve a learning goal, they need to first know and understand that goal (Black *et al.*, 2004: 14). Hattie (2009: 25) adds that goals must be set for both the short and long-term, and that classroom discussion about learning and the learning process significantly fosters learning. This can reinforce a classroom culture of exploratory talk, goal-oriented planning and benchmarking of progress, as well as make it easier for the learner and the teacher to maintain a dual focus on both content and language, and to better manage thinking about and learning of both. Finally, visible goals are central to building and maintaining learner motivation (Gardner, 1985; MacIntyre, 2002).

Language awareness

In order to set language learning outcomes for content classes, teachers would in addition to communication awareness need to be aware of language and its role in the learning process. James and Garrett (1991: 8) define language awareness as 'a person's sensitivity to and conscious awareness of the nature of language and its role in learning.' In education, the classical focus of language awareness 'is language teaching and learning, as well as language learners and teachers' (Malmqvist and Valfridsson, 2003: 155). However, language awareness also 'covers a broad range of issues' such as 'ageism, racism and sexism' that can be grouped under a general heading of 'social awareness' (Edmondson, 2009: 165). This view further reinforces a perception of language as being contextually and culturally bound. Thus, language awareness can broadly be grouped into linguistic awareness and the social and cultural role of language.

Language awareness is particularly important in immersion. When immersion students reach a level where they communicate in their L2 with relative ease, language development may slow down and certain gender, syntax and morphological errors can become fossilised and language may continue to be used in ways that are inappropriate to context (Johnstone, 2002: 5). This may be because content teachers do not maintain high expectations vis-à-vis language (Lyster, 2007: 42-43) and because students do not read for pleasure or have sufficient out-of-school interaction with L2 speakers (Cummins, 2009: 170-171).

Although traditionally language awareness in education was achieved by teaching grammar (van Essen, 2008: 12), this is now considered insufficient. Registers of language also need to be explicitly taught. Mercer and Barnes (2007: 118) suggest that registers are particular to learning discourse communities which share ways of using language to 'explain ideas, describe events or processes or construct arguments.' Genesee and Lindholm-Leary (under publication) add that academic registers of language also include 'specialised grammar, discourse/textual, and functional skills associated with academic instruction and mastery of academic material and tasks; [... and] both oral and written forms of language.'

Academic language

Students proficient in academic language possess the language and content knowledge, as well as the meta-cognitive strategies necessary to consistently function effectively in classroom discourse, including taking into account contextual variables such as the tenor of a relationship and the expected mode of communication (Chapelle, 1998: 47). Cummins (2000: 55) refers to this as 'cognitive academic language proficiency (CALP)' or simply academic language proficiency. He contrasts CALP with BICS (basic interpersonal communication skills) which refer to the language of everyday social discourse cautioning that educators can mistakenly assume that when students achieve BICS that they have also achieved CALP (*ibid.*: 58).

Cummins (2000: 68) suggests a framework for language and content learning consisting of four quadrants: cognitively undemanding and context embedded; cognitively undemanding and context reduced; cognitively demanding and context embedded; and, cognitively demanding and context reduced. Academic language falls mostly into the final quadrant, which 'requires high levels of cognitive involvement' in situations where the student is 'only minimally supported by contextual or interpersonal clues' (*ibid.*). This final quadrant is redolent of Bernstein's (1971: 66) analysis of the language of schools as being universalistic, context-free and explicit. Cummins sums up academic language proficiency as 'the ability to make complex meanings explicit in either written or oral modalities by means of language itself rather than by means of contextual or paralinguistic cues' (Cummins, 2000: 68-69). In general, it is thought that it takes about 5-7 years for immigrant students in English-speaking environments to develop academic language proficiency (*ibid.*: 58; Hakuta *et al.*, 2000; Parrish *et al.*, 2006). It can be assumed that developing academic (second) language proficiency in bilingual education would also be challenging, and require a systematic effort by educators and students across Grade levels (Cloud *et al.*, 2000: 14).

Faced with teaching challenging academic content to students who are far from proficient in their L2, teachers could resort to task reduction and simplification. Cummins (2007: 126 referring to MacKay, 1992) warns that if teachers make student tasks cognitively easier than foreseen in the curriculum, they may inadvertently trap students in an impoverished learning environment, where they will not be able to learn the language and content they need for academic success. This reinforces the need to maintain high standards and expectations, and underlines the integrated nature of language and cognition. To maintain high standards and to systematically plan for learning, there is a need to make visible academic language and its constituent elements so that teaching and learning outcomes and effective learning strategies can be established. Many researchers and practitioners also call for the provision of language and content scaffolds that foster critical thinking about both (Gibbons, 2002; Echevarria *et al.*, 2004; Walqui, 2006).

Making academic language visible

Several academics suggest ways that academic language can be made visible to students and its learning planned for in a systematic manner. Dutro and Moran (2003: 239) offer an architectural image where words and phrases reflecting content concepts such as government, voting in elections and prime minister are considered the bricks, and the mortar words are the phrases and sentence structures used for connecting content concepts. Coyle *et al.* (2010: 37) make a distinction between 'language of learning' and 'language for learning' with the former consisting of the 'language needed for learners to access basic concepts and skills relating to the subject theme or topic' and the latter consisting of the 'language needed to operate in a foreign language environment' to engage, for example, in group work, debate or enquiry. Breaking language into the above categories and scaffolding its use is likely to foster both language and content learning. Fortune *et al.* (2008: 88-99) consider it particularly important that content teachers understand the

component parts of language and how these parts are interconnected in order for them to be able to also teach language.

Furthermore, the language, which arises *in situ* in a classroom, can be distinguished as an entity in its own right. Coyle *et al.* (2010: 38) identify this as ‘the language through learning.’ When students are expressing their thoughts in the L2, this may initially be done through the inaccurate and awkward use of the L2 or by using bits of the L1. Such moments help make visible a student’s current language knowledge and language learning needs. They are what Dutro and Moran (2003: 230) refer to as ‘teachable moments’ or opportunities for teaching language in a situation where it would have an immediate application. Vocabulary and discourse patterns learned *in situ* are more likely to constitute meaningful learning, and as such, are more likely to be retained and put to future use (Mehisto *et al.*, 2008: 182). In addition, language appears to be best learned ‘just-in-time’ for immediate use, as opposed to ‘just-in-case’ for future use. Meltzer and Hamann (2005: 23 referring to Alvermann and Moore, 1991; Rosenshine, 1997; *et al.*) argue that there is strong evidence to suggest that teaching language in the moment when it is required is more effective than pre-teaching vocabulary. Cloud *et al.* (2009: 136) suggest pre-using vocabulary in a meaningful activity as opposed to pre-teaching it. In a similar vein, Gass (2003: 232) suggests that instead of teaching the exception to a grammar rule, error correction in a communicative context may be more effective than the pre-teaching of exceptions.

Language input and output

It is generally agreed that high quality language input and plenty of opportunities to use language are central to language learning. Fortune (2000: 2-4) lists a ‘L2 rich learning environment’ as one of the ‘key pedagogical goals’ for teachers in immersion settings, calling for comprehensible input and encouraging ‘extended student output’. Practitioners and trainers Little (2005), Boynton (2005) and Desrocher (2005) all stress the need for rich language input and opportunities for students to use language in meaningful ways that allow for the learning and use of content knowledge. Coyle *et al.*’s (2010) 4Cs model (content, cognition, communication, culture) stress the importance of rich opportunities for using language and content in meaningful ways. This need to create rich opportunities for students to use content and language reflects the earlier discussion in this chapter about dialogic teaching and the shared nature of cognition and the construction of knowledge as a social act.

In bilingual education, where the teacher is often the primary language model, the quality of the teacher’s language is an important factor in learning. It can be argued that the better the teacher’s command of the target language, the more transparent and accessible the language will be, in particular, for the learner. Krashen (1991: 409) suggests that L2 language input should always remain slightly above a student’s current level of language development. If this is not done, no new language is being modelled for learning. Teachers are expected to be proficient in the L2 (Swain and Johnson, 1997: 8). At the same time, teachers are encouraged to provide students

with access to other models of language by inviting guests into the classroom and through the use of various media (Boynton 2005: 105). Goldenberg (2008: 13), who reviewed five meta-studies on language learning, stresses that effective language instruction provides ‘a combination of a) explicit teaching that helps students directly and efficiently learn features of the second language such as syntax, grammar, vocabulary, pronunciation, and norms of social usage and b) ample opportunities to use the second language in meaningful and motivating situations.’

Authenticity

Learning language for the sake of just language learning is not as meaningful as the use of that language to discuss issues of interest and substance. Authentic learning is inextricably tied to the individual and his or her interests. This is a key reason why effective authentic learning environments hold the potential of increasing student engagement and learning. Scholars have had difficulty in agreeing on the meaning of the term authenticity with a minimum of ‘eight possible inter-related meanings’ emerging from the professional literature (Gilmore, 2007: 98). Some academics situate the concept in the language produced by students, others in the nature of learning materials, others in the task undertaken by students, and still others in interactions among students and teachers (*ibid.*). While recognising the value of authentic learning materials and other possible definitions of authenticity, this thesis will focus discussion above all on the building of authentic learning environments with particular attention given to the teacher-student relationship, the tasks student undertake for learning, and barriers to authentic learning.

The origins of the word authenticity (self + doer) bind together the concepts of authenticity and agency (the capacity for acting or for exerting power) (Murray *et al.*, 1970: 569-570). In modern usage the word authentic is also taken to mean genuine or original, not artificial or imitation (*ibid.*). In authentic learning the learner is the author of his/her own learning, as well as ‘the subject of his/her own learning’ (Kohonen, 2009: 12 referring to Kaikkonen, 2000), and the learning itself needs to be genuine as opposed to false. Applying the concept of authenticity to learning, including language learning, encompasses language use, interpersonal relationships and the management of learning, all curricula, as well as learning materials, environments and contexts, among others.

Widdowson (1979: 80) makes a distinction between genuine and authentic language use with genuine referring to language currently in use in the media that has not been created for language learning and with authenticity being ‘a characteristic of the relationship between the passage and the reader’ and the appropriateness of response. However, as van Lier (1996: 126) points out, ‘it is easy to bring genuine pieces of language into the classroom, but to create authentic opportunities of language use on their basis appears to be quite another matter.’ Authenticity resides in the teacher-student relationship and in how materials are worked with. Van Lier (1996: 128) argues that authentication ‘is basically a personal process of engagement’ where ‘the people in the setting, each and every one individually for him or herself, as well as in negotiation with one another, authenticate the setting and the actions in it.’ The essence of the concepts of authenticity

and autonomy does not allow for their imposition on students by teachers. They must be allowed to emerge 'afresh with each new class' through a process of exploration and negotiation (Little, 2008: 254).

Factors fostering authenticity

As authenticity and autonomy are born through dialogue and negotiation, factors fostering authentic communication will be explored. For Paulo Freire (1972: 78) 'dialogue cannot exist without humility' and an effort by its actors to build equality and equity. Yet, the student-teacher relationship is often characterised by an imbalance in power in favour of teachers who are also often seen as using coercion in their communication with students (Jamieson and Thomas, 1974: 323, 331). The student, as the typically less powerful actor in the teacher-student relationship, must on some level, whether coerced or not, choose to engage or 'exit' (Hirschman, 1970: 4). This echoes Bruner's (1996: 30) view that schools are an 'unpredictable mix of coercion and voluntarism.' In addition, language, as the primary vehicle for dialogue, is an instrument of power and subject to unfair use, a fact of which the speaker may or may not be aware.

Given that the concept of equality is complex and difficult to navigate, van Lier (1996: 140) proposes that educators instead concentrate on 'symmetry' and 'equal participation rights and duties.' This is redolent of Mercer and Dawes (2008: 55-71) and Barnes (2008: 1-16) who argue for increasing student voice in classrooms through the fostering of exploratory talk. In addition, it should be possible to build equality by focusing on values such as respect, physical and emotional security, as well as a personal sense of worth, and constructive attitudes that foster both individual growth and the greater good.

Keddie and Churchill (2005) who explored teacher-student relationships in Australian middle schools conclude that respectful teacher-student relationships can help redress the inherent imbalance of power between these two groups. In addition to being respectful, in effective teacher-student relationships both sides feel a sense of empathy towards and affiliation with each other. A teacher's affiliation to students is 'the degree to which a teacher claims or constructs shared membership with his/her students in a valued group' and this is 'a key variable predicting educational achievement, with important implications for student welfare' (Pennington under publication). Similarly, Pianta (1999: 15) found that positive student-teacher relationships correlated with 'better than expected or improved outcomes for both risk and non-risk samples.'

Cornelius-White (2007) analysed 119 studies, dating from 1948-2004 covering seven countries and a broad range of students, which had looked at variables associated with person-centred/ student-centred education. Cornelius-White (2007: 113) defined person-centred education as including 'teacher empathy (understanding), unconditional positive regard⁵⁵ (warmth),

⁵⁵ Cf. also Rogers (1961: 283-84) for a discussion of the nature and value of unconditional positive regard.

genuineness (self-awareness), non-directivity (student-initiated and student-regulated activities) and the encouragement of critical thinking (as opposed to traditional memory emphasis).’ Many of these variables, which are central to the building of effective relationships, either reflect the previously stated characteristics of authentic learning environments or are likely to promote their negotiation. Cornelius-White (2007: 120) concluded that there is a strong correlation between person-centred teachers and improved student achievement.

Legenhausen (2009: 382, 384-385) proposes that in authentic language learning environments students have a say in setting up activities; their previous knowledge is activated; flexibility and openness characterise tasks; creativity, self-discovery and self-awareness are promoted, as are group dynamics and social management skills; learning outcomes and processes are negotiated and evaluated; and, accommodations are made for individual differences. Kohonen (2009: 11) adds that planned learning needs to be considered meaningful and important to the students. These characteristics are student-centred, and not only give students as individuals and as a group a voice, but call on them to assume responsibility for themselves and others. However, as Holec (1981: 7) points out a learner must ‘know how to make decisions’ about his or her learning and there must be structures in place that give the learner ‘the possibility of exercising his (*sic.*) ability to take charge.’ Developing meta-cognitive, meta-affective and meta-social strategies plays a central role in helping the learner take charge of his or her learning (Oxford, 2011: 5), and in developing the self-awareness, group dynamics and social management skills for which Legenhausen (*op. cit.*) argues.

As a case in point, Stevens (1983) compared 11-12 year-old students in a teacher-centred (TC) immersion programme where 80% of the curriculum was delivered through the L2 with students of a similar age group who were in a student-centred programme where 50% of the curriculum was delivered through the L2. Second language skills in the student-centred programme were ‘comparable to those of students in the TC program, despite the time differences’ (*ibid.*: 262). Stevens (1983: 261, 266-267) states that in the student-centred programme students: chose their own areas of study from within prescribed themes; sought out information to do project work; presented their work; used each other and the teacher as a resource; and students had contact and communication with native speakers of the L2. If these results were to be replicated elsewhere, the savings in time would be so substantial that this alone would justify taking the time and risk that some educators may feel would be involved in building authentic learning environments.

Barriers to authenticity and student engagement

Besides taking into account the obstacles to student engagement in communication discussed above, teachers working to build authentic learning environments are expected to skilfully counter several other potentially harmful influences. For example, even when students are taught to recognise and discuss discriminatory practice, racial, ethnic and class tensions of society are still reflected in the classroom (Freeman, 1998: 190). Pennycook (1997: 44) concurs that autonomy can

never be divorced from cultural, political, social and economic constraints. In addition, Nuthall (2005: 903) found that the students' personal and social world competes for space in classrooms. Students observing videos of themselves doing assignments reported that their thinking was driven by how to complete tasks quickly or with the least amount of effort (Nuthall, 2005: 918). Additionally, Nuthall (*op. cit.*) found that 'typically, students already knew at least 40% of what the teachers intended them to learn.' Nuthall (2005: 920) suggests that 'teachers depend on the responses of a small number of key students as indicators and remain ignorant of what most of the class knows and understands.'

Students who are interested in completing assignments quickly and with little effort while gaining time for their personal and social world are unlikely to challenge classroom activities that do not interfere with those goals. This implies a need to maintain high levels of engagement and high expectations for all students, and for developing a broad and in-depth knowledge and skills base among teachers and students about how to do so. This would include building learning skills. The consequence of not planning for learner autonomy, of not helping students to develop learning skills, can leave those students who are least prepared to manage their own learning at a distinct and likely ever-growing disadvantage. For example, Watkins (2005: 80 referring to Atkinson, 1999) reports on a study that reviewed GCSE examination results in England, and found that students who 'plan the least have just 30% of the scores of pupils who plan the most.' In situations where students are faced with intellectually challenging tasks, Veenman *et al.* (2002: 337), who studied over 300 first-year university students, found that meta-cognitive skills are a greater determinant of student achievement than intellectual ability as measured by IQ tests.⁵⁶ This reinforces Holec's (*op. cit.*) point about helping students to develop tools to make decisions.

The symmetry and equality sought after in the creation of authentic learning environments that maintain high expectations for all students invite a discussion about high standards being applied to other stakeholders in education including teachers. Yet, teacher beliefs may stand in the way of student learning and the co-construction of authentic learning environments for all. Dweck (2006) makes a distinction between educators with a 'fixed mindset' who believe that intelligence is fixed and those with a 'growth mindset' who believe that the brain is more like a muscle that can be exercised. Dweck (*ibid.*) documents cases in several schools where low teacher expectations vis-à-vis students that had been labelled as having low ability contributed to students remaining locked in a cycle of low achievement. In contrast, '[w]hen teachers had a growth mindset [...] many of the students who had started the year as low achievers moved up and became moderate or even high achievers' (Dweck, 2010: 28). Teachers who believe that intelligence is fixed 'may not take steps to help them [students] develop their potential' (*ibid.*).

However, praising students and encouraging them all to do well requires knowledge about how this can be done effectively. Dweck has studied the effects of praising students' intelligence instead of effort. She has found that when students face difficulties '[t]hose who are praised

⁵⁶ Cf. Knouzi *et al.* (2010) and Edmondson (2009) for a discussion of the importance of language learners being able to manage and scaffold their own learning.

for intelligence lose their confidence and motivation, their performance plummets, and they are ashamed of their difficulty (almost 40% of them lie about their score). But those who are praised for effort remain undaunted and their performance continues to improve' (*ibid.*). In a similar vein, Hattie (2009: 124) claims that not-labelling students had a high positive impact (effect size of 0.61) on achievement.

What continues to become apparent is that with each feature of successful bilingual education being raised such as maintaining high expectations considerable knowledge is needed to understand it and the dynamics that come into play when trying to apply it. To further illustrate this point about high expectations, when high expectations for teachers are measured to too great an extent through student achievement, it can have negative consequences on teachers and students. Stobart (2008) details the negative 'backwash' created by high-stakes tests in several nations and how this can actually impede learning. Scott (2000: 1) claims that the introduction of national testing and a national curriculum, among other factors, have contributed in England to a situation where teachers have 'begun to lose the ability to think critically about the processes which they initiate, and to experiment in situ'. Watkins (2005:13) reinforces this view arguing that in England teacher agency has been reduced and students are often seen as 'vessels into which curriculum is delivered.' In such circumstances, Deci *et al.* (1982: 858) found that teachers become more controlling: they 'lecture and explain more, and they give children less choice and opportunity for autonomous learning' as a consequence of which students' intrinsic motivation declines. By contrast, Reeve *et al.* (2004: 165) found that the more teachers display 'autonomy-supportive instructional behaviors, the more engagement their students [show].' Feeling some level of independence, control and power over one's life are fundamental psychological needs, and if these are denied to students, they will seek ways of satisfying these needs in a manner that may well impede learning (Frey and Wilhite, 2005: 157, 159).

The relationship between authenticity and meaningful learning

When faced with new information the 'brain immediately begins a filtering process to determine which data are relevant' and what should be discarded (Westwater and Wolfe 2000: 49). This implies that educators seek to understand what is considered relevant by students, and to connect new learning to this. Howard-Jones (2007: 18) in his commentary on a review of neurosciences literature argues that meaning is physically constructed in the brain so that '[w]hen we learn new information, the links that form between this new information and our existing knowledge serve to make it meaningful.' Similarly, Koizumi (2003: 126), a neuroscientist, defines learning as a 'process by which the brain reacts to stimuli by making neuronal connections that act as an information processing circuit and provide information storage'. An important element in this definition is that information is stored and, made available through neuronal connections for future use. Understanding an issue today is not an example of learning, if it cannot be retrieved tomorrow.

To build relational links, several practitioners and researchers suggest teachers in bilingual education organise the 'curriculum around content-based thematic concepts' (Desrochers, 2005: 134-135; Fortune, 2000: 2-4). Baker (2006: 344) considers classroom 'cross-curricular approaches' as a requirement for promoting biliteracy development. Yet, Kysilka (1998) stresses that applying this approach is difficult for many educators. Another strategy central to creating meaning is scaffolding, as it supports students using their current knowledge base to acquire new learning. Due to the additional cognitive, emotional and other challenges of learning through an L2, the provision of enhanced scaffolding takes on a particular importance in bilingual education (Walqui, 2006: 169-178). This involves seeking to activate students' knowledge related to the content being studied, as well as related L2 and L1 knowledge. L1 usage in L2 classes can reveal language that needs to be taught in the L2. Additionally, academic achievement and cognitive development in bilingual education are inextricably tied to the systematic scaffolding and learning of L2 academic language over a minimum of 5-7 years (Cummins *et al.*, 2006: 13, 52). Walqui (*ibid.*) proposes scaffolding strategies such as modelling, bridging, contextualising, schema building, re-presenting text and developing meta-cognition. The ultimate goal of scaffolding is to support students in becoming self-directed learners who can seek out resources and people to support them in their ongoing learning.

Furthermore, in order to make learning more meaningful, to increase language input and output, and to scaffold out-of-school L2 language use and L2 network-building, schools are encouraged to facilitate student contact and communication with second language users (Lo Bianco, 2009: 34; Murtagh, 2007: 450). Mehisto *et al.* (2008: 195) suggest that this can be done between groups who are both learning the same L2, as this acts as a type of scaffold for both groups by 'levelling the playing field.' However, Coyle (2008)⁵⁷ cautions that exchanges need to be well-planned and well-constructed incorporating long-term learning activities in order to avoid non-reflective exchanges that resemble excursions which may instead reinforce existing prejudices and/or stereotypes held by participants.

Specialists in language teaching have long emphasised a need for teachers to focus on all four language skills – reading, writing, speaking, listening. Additionally, each of these four language skills is not only central in language learning, but each is also thought to play an important role in meaning making. Thomas (2001 referring to Just 2001) states that '[a] newscast heard on the radio is processed differently from the same words read in a newspaper. [...] Listening to an audio book leaves a different set of memories than reading does.' Similarly, Olson (1994: 143) who analyses the cognitive implications of reading and writing argues that each gives 'rise to new ways of thinking about the world.' Different areas of the brain are activated when a person uses different language skills. Neuronal links between these different areas not only enhance meaning, but have the potential of reinforcing one another and deepening understanding, thereby making learning more meaningful.

⁵⁷ Personal communication.

Furthermore, cognitively challenging learning experiences are more meaningful for students than less challenging ones. Accordingly to Baddeley (2004: 161) students are more likely to recall details from a cognitively challenging than an easy problem. In dual language education, Lindholm-Leary (2001: 139) found that 'students were no more likely to incorrectly answer a high-order question than a lower-order one.' However, research from the neurosciences does show that when initially faced with a cognitively challenging problem the brain needs to bring considerable resources to bear in order to solve it (Howard-Jones, 2007: 17). This suggests that in bilingual education rich language scaffolding may release extra cognitive resources for processing difficult content concepts. Thus, teachers are faced with striking a balance providing appropriate scaffolding whilst fostering 'cognitive fluency' (Unkelbach, 2006: 339) and maintaining a high level of challenging cognitive engagement.

Conclusion

As key features of effective immersion programmes are numerous, teachers in, and leaders of, these programmes, who attempt to synthesise and apply all of these features, can face the possibility of complexity collapse or cognitive overload. Building one's capacity for self-management is a potentially helpful way of more effectively navigating the complexities of bilingual education. This is likely to include developing meta-cognitive, meta-affective, and meta-social strategies. Moreover, a steady expansion, both in the breadth and depth, of one's knowledge base about the features of successful immersion programmes is also desirable. At the same time, it appears that no formulaic solutions can be applied in immersion education, and that this wide variety of features is inter-connected, and each of these features requires considerable knowledge and skill to navigate. For example, this means that not only do leaders and teachers need an understanding of the role of language in learning, but they also require an understanding of the dynamics of communication and the skills to increase dialogic teaching/learning, and the habit of maintaining an integrated dual focus on content and language learning. In turn, these understandings, skills and habits are tied to a need to systematically scaffold the development of academic language and achievement over several years. In addition, there are numerous barriers to learning to be overcome such as some leaders', teachers' and students' own low expectations or the impact of high-stakes examinations. Skill is required in building rich learning environments by, for example, having high expectations for all and encouraging engaged reading among students. Equally importantly, the fostering of learner autonomy holds the promise of building intrinsic student motivation and contributing to greater learning. Learner autonomy is also tied to communication awareness, the quality of the teacher-student relationship and issues related to equity. Programme leaders, who are aware that controlling environments imply to teachers and students how they should think and what they should feel, thereby possibly undermining their intrinsic motivation and capacity for critical thought, may be better placed to help build a school culture supporting stakeholders in becoming more autonomous and cooperative learners.

As the complexities of teaching in and leading and implementing immersion programmes originate to a large extent in the multiple perceptions, understandings and actions of stakeholders, it is particularly important for teachers and headteachers to build their capacity to lead and/or navigate stakeholder learning and cooperation. Working with stakeholders requires for the purposes of analysis, the ability to separate fact from feelings and for the purposes of decision-making, the ability to knowledgeably guide others in associating facts and feelings. This requires high levels of meta-cognitive and meta-affective self-awareness, as well as meta-social awareness. It calls for the ability to navigate the objective and subjective, to cooperatively build structures and yet encourage stakeholder agency and knowledge building. Ways of working with stakeholders will be explored in the next chapter.

CHAPTER NINE: STAKEHOLDER COLLABORATION

A considerable body of evidence demonstrates that additive bilingual education can serve the educational needs of young people and their communities. Although the features of successful immersion programmes have been researched they remain context dependent and emergent, operating in a complex world of personal beliefs, assumptions, competing priorities, and political agendas. It is the dynamics of stakeholder relations and the ability of stakeholders to work together as a learning community where leadership is distributed among its members that holds the key to keeping myths in check and injecting greater doses of disciplined, rational thinking into the debate about and planning for bilingual education. Thus, this chapter identifies potential stakeholders in bilingual education settings, for these include other groups besides students and teachers. These other stakeholders have received little attention in the professional literature on bilingual education. The chapter also focuses on the ways stakeholders can work together to guide collaborative activity. Finally, it explores how stakeholders can create professional learning communities, to help create the breadth and depth of knowledge required to respond to the dynamic and ongoing emergent nature of bilingual education.

Identifying stakeholders

In the competitive worlds of business, education and politics, understanding the interests and concerns of those who have a stake in one's 'business', and learning more effective ways of working with them, is essential for long-term survival. The stakeholder approach is primarily a managerial tool (Donaldson and Preston, 1995: 87) aimed at helping organisations to navigate the concerns and interests of others. Stakeholders, as a term used in the stakeholder approach, were initially defined as 'those groups without whom the organization would cease to exist' (Näsi, 2002:16 referring to Näsi, 1995). Expanding on that definition Freeman has coined what is widely quoted by stakeholder theorists as the classic definition of the term, stakeholder – 'any group or individual who can affect, or is affected by, the achievement of the organization's objectives' (Lépineux, 2005: 100 referring to Freeman, 1984).

In 1993, Carroll expanded on Freeman's definition by explaining that firms and stakeholder groups may affect each other's 'actions, decisions, policies or practices' and emphasising that 'there is a potential for two-way interaction or exchange of influence' (Näsi, 2002: 17 referring to Carroll, 1993). In 1997, Carroll and Näsi (2002: 51 referring to Carroll and Näsi, 1997) further expanded on Carroll's 1993 stakeholder definition by bringing in the element of legitimacy, as well as the elements of validity, and 'legal' and 'moral' rights. Even Friedman, who spoke of the

corporation's primary purpose as one of wealth maximisation for its shareholders, argued that this 'must take place within the constraints of law and morality' (Phillips, 2003: 36 referring to Friedman, 1982). These two concepts of law and morality give an individual two points of reference to keep in mind when applying a stakeholder approach – an external one based in the law, and another, which is internal and often universal, within the confines of a culture, and based on ethics or morality.

For the term stakeholder to be meaningful, its scope must be narrowed in order to create a distinct group of manageable size. Researchers have helped to narrow the scope by proposing numerous stakeholder categories such as: primary and secondary; internal and external; voluntary and involuntary; legitimate versus illegitimate; and, active versus passive (Crane and Livesey, 2003; Phillips, 2003). The identification of stakeholders is central to the stakeholder approach. A rigorous process is required to identify those who can affect or be affected by an organisation or a programme planned by an organisation. While co-constructing the results-based management framework and the strategic plan for the Estonian immersion programme with major stakeholders a further process of identifying additional stakeholders revealed new interest groups whose inclusion was essential to the implementation of the programme. For example, without having kept statistics on gender, it would not have been possible to measure whether more boys or girls enter or drop out of immersion, and if both of these groups constituted separate stakeholder groups with specific needs.

In a school or a group of schools offering bilingual programming internal stakeholders could comprise the following main categories of stakeholders and additional subgroups of stakeholders (as identified in parentheses): students (i.e. male, female, those with learning difficulties, gifted, socially disadvantaged, socially advantaged, primary, secondary, and those belonging to student associations); parents (i.e. parent council members, mothers, fathers, those who are socially advantaged or disadvantaged, bilinguals, monolinguals, speakers of a regional language, and non-speakers of a regional language); teachers (i.e. monolinguals, bilinguals, those teaching through the L1, those teaching through the L2, those teaching through the L3, experienced, inexperienced, those opposed to bilingual programming, those supportive of regional languages, those opposed to regional languages, and leaders); other staff (i.e. librarians, secretaries, psychologists, social workers, monolinguals, bilinguals, those supportive of bilingual programming, and those opposed to bilingual programmes); and school managers (i.e. headteachers, and deputy headteachers).

A school's or a group of schools' external stakeholders could comprise: politicians (i.e. local, regional, national, monolingual, bilingual, those in favour of regional languages, those against regional languages, and those on committees and councils including parliamentary committees); government (i.e. local government; boards of education; regional and national ministries of education, culture, labour and immigration; agencies administering regional or national exams; the national president's office; and departments, committees, councils, groups or individuals within any of these organisations); training institutions (i.e. universities, teacher training colleges, rectors, deans, teacher trainers, researchers, trainers of managers, those opposed to bilingualism,

and those supportive of bilingualism); authors (i.e. textbook writers, didacticians, theorists, and publishers); media (i.e. journalists from radio, television or print media, those supportive of bilingual education, and those opposed to bilingual education); international partners (i.e. educators, researchers, international bilingual education networks, individuals or groups that have spearheaded the successful implementation of bilingual programming); parent associations; teacher associations and unions; student associations and unions; trade unions; employers and professional associations.

Moreover, several of these groups or subgroups overlap with one another. For example, monolinguals and bilinguals may be considered as different groups with different needs and concerns, and include teachers, parents, school managers and others. The number of stakeholders may appear overwhelming, but any one of the above has the potential of either supporting or hindering the development of programming. The key is to develop sufficient synergy among stakeholders to be able to act on programming based on mutual understanding, and to ensure that concerns that could lead to stasis or the undermining of programming are addressed. For example, as discussed in chapter three, Estonian textbook authors, teachers, Immersion Centre staff and steering committee members, independent experts, as well as textbook designers and illustrators went through a lengthy process of negotiations before all the parties considered the final product fit for publication.

Such a broad list of stakeholders in bilingual education holds the danger of overwhelming those seeking to identify and cooperate with stakeholders. In order to decide how much time to accord one stakeholder over another, it is helpful to develop priorities, 'to understand the relative power and influence of the different stakeholders, as well as their interest in a particular issue' (Crane and Livesey, 2003: 40 referring to Hill and Jones, 1992, Menzer and Nigh, 1995, Frooman, 1999). Frooman (1999: 193 referring to Mitchell *et al.*, 1997) identifies urgency, legitimacy and power as 'indicators of the amount of attention management needs to give a stakeholder.' Reviewing related literature, Frooman (*ibid.*) concludes that 'although disagreement may exist regarding the importance of legitimacy as an [stakeholder] attribute, most scholars agree that power is an important one.' Thus, if a stakeholder group can wield considerable power over a programme, it requires sufficient attention to help ensure that its members are well-informed and disposed to the bilingual programme and that the programme is meeting their interests.

The various stakeholder categorisations help bring to light a broad range of actors that can impact on bilingual programming, and the complexity of organisational relations. Moreover, the existence of a large number of stakeholders implies struggle and competition, as various groups and individuals seek to defend what they perceive as their interests. As power is considered potentially unwieldy and intoxicating, powerful stakeholders may have clouded judgment. Less powerful actors may not have the same level of access to knowledge and to people with influence, as do more powerful stakeholders. As such, they may be marginalised, and unable to fully understand or defend their own interests. Each individual or group of stakeholders may be so focussed on their own interests that the need to defend the greater good may go unnoticed. Thus,

it is important to pay attention to how stakeholders organise dialogue and how this dialogue can help manage power relationships, and serve the interests of all involved, and ultimately contribute to the co-construction of authentic and effective bilingual learning environments.

Stakeholder collaboration

If collaboration and dialogue are to be more than just theoretical exercises, they should result in change and the required solutions that take into account a balance of varying stakeholder concerns. Crane and Livesey (2003: 48) concur, arguing that ‘parties to genuine dialogue should be open to the transformational effects of their communication’. Similarly, Bendell (2003: 69) states that ‘[f]or stakeholder dialogue to be worthwhile it must not be seen in isolation from real outputs and outcomes, and must involve a tangible sharing of power’. Previously, Clarkson *et al.* (1999: 5-7) had written of the importance of collaboration and of taking legitimate stakeholder concerns ‘into account in decision-making’. This echoes the discussion from previous chapters that stressed the importance of fostering agency not just of students, but of teachers and parents, and giving all these groups a role in decision-making. Authentic teacher-student and teacher-headteacher relationships where power is on some level shared hold the promise of avoiding some of the negative consequences of the controlling relationships discussed in the previous chapter. Authentic stakeholder collaboration is ‘cooperative, inter-organizational action that produces innovative, synergistic solutions and balances divergent stakeholder concerns’ (Hardy *et al.*, 2005: 58). In the same vein, Svendsen and Laberge (2005: 92) expect members of effective stakeholder networks to enter into a dialogue about common problems, issues or opportunities that leads to change and solutions that ‘balance diverse stakeholder concerns’.

However, if stakeholder networks are focused on addressing common problems and seeking out opportunities, it is these problems and opportunities that are at the centre of the debate and not any one organisation *per se*. Hardy *et al.* (2005: 65) state that ‘[t]he collaboration in question is thus constructed as a real and distinct entity, separate and different from the organizations involved in it and more than simply a set of their representatives’. This view is also supported by the concept of societal learning and change (SLC) where ‘rather than thinking of stakeholders vis-à-vis an organisation, SLC initiatives are [seen as] stakeholders vis-à-vis a jointly defined issue’ (Waddell, 2005: 11). Crane and Livesey (2003: 41) describe how this affects the focal organisation: ‘[t]he network conception of stakeholders decentres, or displaces the firm as the central node in the stakeholder model, since the network can be entered simultaneously from many different perspectives. For Crane and Livesey (*ibid.*), this point is of critical importance, as it impacts on communications and decision-making. Mehisto and Asser (2009: 81) in their review of the management of the early immersion programme in Estonia concluded that key stakeholders found a way of working together that placed the desire to develop quality immersion programming above any one organisation’s self-interests.

However, achieving results by way of collaboration requires effectively navigating through the competing demands of stakeholder groups. Moreover, each stakeholder group is likely to include people with diverse opinions, interests, and shifting roles all of which will have to be negotiated if stakeholders are to cooperate in order to achieve jointly held goals. 'This highlights the central role of communication in constituting, managing and maintaining stakeholder relationships' (Crane and Livesey, 2003: 43). Crane and Livesey (*ibid.*: 46) continue to argue that two-way dialogue among stakeholders is the best tool available for solving complex problems. The emphasis on dialogue invites a discussion on how to best conduct these exchanges.

Kaptein and van Tulder (2003: 222) suggest that 'a just outcome [for all stakeholders] depends on the correct organization of the process [of dialogue]'. The literature offers a deeper analysis of the nature of effective communications, and in particular, dialogue, followed by practical guidelines and related considerations that can successfully guide one through collaboration and dialogue within a stakeholder network. These guidelines help avoid 'groupthink', the act of seeking to conform with other group members' opinions (Janis, 1972: 8-9), and 'wilful blindness', the act of ignoring difficult issues (Heffernan, 2011). Bendell (2003) identifies eight levels of stakeholder dialogue: dialogue as manipulation, as therapy, as information, as consultation, as placation, as partnership, as delegation, and as democracy. Dialogue as partnership requires the sharing of planning and decision-making responsibilities, the sharing of power, and is presented in the most positive light. Bendell (2003: 58) goes on to state that 'confrontational dialogue' is often a first step. This is reinforced by Robbins (2003: 178) who sees conflict as an inevitable part of collaboration and by Waddell (2005: 17) who argues that 'tough talk' is a necessary part of 'generative dialogue'. Hardy *et al.* (2005: 69) offer further direction in how to better understand the importance and weight that should be assigned to 'tough talk' by arguing that 'effective collaboration' requires a balance between 'cooperative [...] and assertive talk'.

In order to achieve deeper forms of dialogue that allow for differences of opinion, Bendell (2003: 67-68) suggests structuring dialogue around the identification of important (potentially powerful) stakeholders, the development of trust⁵⁸, being flexible, sharing of information openly, having appropriate time-frames to converse, building realistic expectations and sharing the agenda. Bendell (2003: 69) goes further and argues that stakeholder dialogue 'must involve a tangible sharing of power'. In a similar vein, Kaptein and van Tulder (2003: 212-213) offer the following preconditions for effective stakeholder dialogue: knowing and understanding the parties and common areas of interest; trust and reliability which allows for openness and vulnerability; clear rules for dialogue such as how to deal with confidential information; a coherent vision of stakeholder engagement so that the focal organisation and other stakeholders understand why, how, how often, etc., they will work together; dialogic skills with a clear structure for dialogue and successive meetings; valid information and expertise in the subject matter; and feedback on results.

⁵⁸ Boon and Holmes (1991: 194) define trust as 'a state involving confident positive expectations about another's motives with respect to oneself in situations entailing risk.' Trust is about predictability in the face of risk or adversity.

Hardy *et al.* (2005) emphasise the importance of stakeholders creating and continually reinventing, both within the network and their home organisations, their collective identity through conversations about status, authority, and task-roles. Svendsen and Laberge (2005: 102) also underline the importance of taking joint action based on an action plan. This is redolent of Huxham's (1996: 143) 'group decision support' systems and of the Estonian Immersion Centre's results-based management plans and its strategic plan discussed in chapters two and three. Planning instruments help stakeholders to navigate perceptions and build common understandings, and importantly to avoid misunderstandings. They can provide a concrete object of negotiation that can lead to a clear vision of planned outputs and outcomes, and they can act as a means of developing a deeper level of stakeholder support for and commitment to the realisation of these plans.

Professional learning communities and distributive leadership

There is considerable agreement that members of a stakeholder community and the communities themselves have much to gain from cooperating within their immediate community and with other surrounding communities. Hargreaves (2007: 181)⁵⁹ reports that 'professional learning communities have a systematic and positive effect on student learning outcomes'. Leithwood *et al.* (2008: 35) conclude that schools where leadership is distributed, as opposed to those where it is not, have 'a two to three times higher' positive influence on student learning and achievement. Smith and Wohlstetter (2001: 516) contend that the optimal management and delivery of education 'transcends the capacity of one school working alone.' Similarly, Jackson and Temperley (2007: 45) argue that 'the school as a unit has become too small scale and isolated to provide scope for professional learning for its adult members'. Fukuyama (2004: 26, 27) contends that it is hard to imagine those working on a government payroll in primary or secondary education as being able to achieve quality outputs 'in isolation from the people they serve.' In a similar vein, Hopkins (2002: 5) states 'that any strategy to promote student learning needs to give attention to engaging students and parents as active participants'. Stakeholder involvement also holds the potential of helping to moderate the negative effects of governmental 'situational constructs' (Halverson, 2007: 59). In light of the complexities involved in the organisation of effective bilingual education as discussed in previous chapters, this form of education also surpasses the capacity of any one educational institution working alone and, thus, requires cooperation among an institution's / school's internal and external stakeholders.

Further insights into ways that stakeholders can work effectively together, and manage and share power can be gained from the literature on professional learning communities and distributive leadership. 'A professional learning community is an inclusive group of people, motivated by a shared learning vision, who support and work with each other, finding ways, inside and outside their immediate community, to enquire on their practice and together learn new and better

⁵⁹ Cf. Hargreaves (2007: 181) referring to Louis and Marks (1998), McLaughlin and Talbert (2001), Anderson and Togneri (2002), Bolam *et al.* (2005).

approaches that will enhance all pupils' learning' (Stoll *et al.*, 2006: 5). Bolam *et al.* (2005) who undertook an extensive literature review, administered and analysed questionnaires from 393 schools and undertook 16 case studies, concluded that professional learning communities tend to: have shared values and visions; assume collective responsibility for student learning; foster reflective professional inquiry; facilitate collaboration, which includes open and frank debate; and, promote group, as well as individual, learning.

Distributive leadership is a form of shared leadership. Harris (2008: 112-113) argues that 'distributed leadership'⁶⁰ includes the following characteristics: sharing of a common vision and goals; the shifting of leadership according to need and based on knowledge; forming collaborative and fluid teams for specific purposes; discussing in emergent communities of practice future needs and groupings; having individuals assume leadership positions, when needed; giving tasks regarding organisational goals to those best able to achieve them; distributing roles and tasks at different times, in different places and under divergent conditions; undertaking inquiry leading to knowledge creation and organisational improvement. Previously, based on an extensive review of the distributive leadership literature, Bennett *et al.* (2003: 6) contend that the concept encompasses: seeing leadership as a result of the dynamics of interpersonal relationships (an emergent property of the group); building trusting and open relationships; 'letting go' by senior staff rather than simply delegating tasks; extending the boundaries of leadership, not just within the teaching community, but to other communities within the school; creating a team culture throughout the school; growing it through the concerted action of groups through their interpersonal relationships; recognising expertise rather than formal position as the basis of leadership; and seeing leadership as fluid rather than located in specific formal roles or positions.

The above definitions for professional learning communities and distributed leadership emphasise learning, and thereby, de-emphasise positional power that emanates from the legal, formal authority of a leader's position. This does not point to a decline in the role assumed by formal leaders, but instead indicates a shift in their practice 'to build leadership capacities in others, and to monitor the leadership work of those others' (Leithwood *et al.*, 2007: 63). In addition, the above definitions imply that the complexities of education are such that one leader alone could not retain all the knowledge or have the capacity needed to manage programming. These definitions perceive of leadership as inclusive in nature and de-emphasise hierarchies. They stress cooperation and the need for inquiry of existing practice. Inquiry into existing practice opens the way for not only identifying positive practices, but for bringing to light weaknesses that need to be addressed. This potentially accords knowledge about practices that need to change and knowledge about how to do so a considerable measure of power. It accords shared knowledge a form of positional power and influence, and thereby, a key role in leadership.

⁶⁰ The terms distributed leadership and distributive leadership are at times used interchangeably; however, *distributed leadership* as a term can be interpreted as implying a paternalistic view. MacBeath *et al.* (2004: 12) prefer the term distributive leadership to describe situations where individuals are 'holding, or taking initiative as a right' as opposed to having the right 'bestowed as a gift' as might be assumed from the term distributed leadership.

Members of both professional learning communities (PLC), and of communities where leadership is distributed (DL), share a common vision. This suggests agreement on goals, which constitutes an act of power sharing. As with the previously described network concept of stakeholders, both PLC and DL initiatives decentre the organisation or a given leader by placing the greater good and learning at the centre of what drives a community or a group of communities. As such, both PLC and DL initiatives recognise the emergent nature of education, the inadequacy of formulaic solutions, and the need for the application of adequate knowledge and critical thought. These initiatives resemble the authentic learning environments discussed in the previous chapter, as authentic learning environments work to redress power imbalances, negotiate goals and maintain high expectations for all. Authentic learning environments need to be constantly renegotiated and created anew which is also the case for PLC and DL initiatives that are constantly seeking to improve education. As Spillane and Diamond (2007: 148) argue, DL initiatives place 'the onus on users to diagnose and design school practice well in order to enable improvement', thereby fostering agency and authenticity by leaving educators the responsibility for improving education.

Professional learning communities are built, and leadership distributed through interaction (Hallett, 2007: 105). Relationships drive interaction. Bennett *et al.* (2003: 3) define the concept of distributed leadership as a 'group activity that works through and within relationships, rather than individual action.' Similarly, Mitchell and Sackney (2007: 319) state that a professional learning community is 'fundamentally a place of and for connections, relationships, reciprocity, and mutuality.' Relationships are manifested through stakeholder interactions and discourse, through their planned and unplanned action, and inaction. These can reveal an individual's or a group's intentions, beliefs and understandings. Once identified, there is a greater likelihood that intentions, beliefs, understandings and actions are knowledgeably discussed, and common understandings built. Furthermore, Spillane and Diamond (2007: 10 referring to Wertsch, 1991) point out that stakeholder 'interaction is mediated by tools, routines, and other aspects of their situation', and their use and analysis are key to understanding how to distribute leadership, and by extension, how to build professional learning communities. Tools, routines and situational constructs are also likely to impact on thinking.⁶¹ However, the best of tools, routines and situational constructs do not guarantee the co-construction of professional learning communities where leadership is distributed and knowledge critically co-constructed. In addition, Halverson (2007: 58) points out that even in schools where there are considerable interactions, 'not all of these interactions help create professional community.' Neither do good relationships among highly qualified professionals necessarily lead to the building of a positive community, let alone a professional learning community.

Tools, routines, situational constructs, and relational interactions can instead lead to the development of pseudo-communities where 'there is no authentic sense of shared communal space but only individuals interacting with other individuals' (Grossman *et al.*, 2000: 18). A pseudo-

⁶¹ Hutchins (1995: 374, 370-373) posits that cognition is a 'cultural process' distributed across objects, individuals, representational structures (e.g. a logbook) and tools in the environment.

community avoids frank and open talk, suppresses conflict and joint decision-making. A pseudo-community expects its members to leave the appearance of congenial face-to-face relations and to never intrude on issues of personal space whilst leaving an 'illusion of consensus' (*ibid.*: 17-18). Pseudo-communities tightly regulate the expression of conflict and dissent, relegating disagreements away from full community discussions to one-on-one interactions. In pseudo-communities, 'there is no genuine follow-up in face-to-face interaction, [because] conversation partners are able to speak at high levels of generality that allow each to impute his or her own meanings to the groups' abstractions' (*ibid.*: 17). This would make it impossible to subject assumptions, terms and plans to a rigorous process of critical thought and analysis, or to build a common vision and goals. If left unchallenged, a pseudo-community, in comparison to an authentic professional learning community, would due to its inauthentic nature, constitute for its members an impoverished learning environment making it difficult to maintain and/or work toward high expectations for students and staff – a key feature of successful immersion programmes.

A more subtle form of pseudo-community can be seen in schools where educators enter discussions about learning, but where there is a high level of classroom autonomy and teachers are reluctant to open up their classrooms and practice to the view of others. This situational construct represents what Hallett (2007: 86) refers to as the 'cellular classroom structure' where classroom practices have been privatised by teachers, and are not open to public view by colleagues. A professional learning community calls for its members to reflect on their own practice, and this can only be done if that practice is open to inquiry. As Freire (1993: 121) argues, opening up classroom practice through, for example, videos of lessons helps 'us understand better our own practice and to perceive the gulf that almost always exists between what we say and what we do.' Aubusson *et al.* (2007: 147) speculate that opening up one's lessons to peer observation indicates that 'the antecedents of a trusting, sharing professional learning community exist.' If teachers are not willing to reflect on and discuss their classroom practice, it will be difficult to improve it and subsequently build a learning community. However, a pseudo-community need not be perceived as an obstacle to reform, since it can be used as a learning tool. Aubusson *et al.* (2007: 140), who studied how 82 schools worked to build professional learning communities, prefer to view a pseudo-community as a natural part of the learning process; as a 'transitional phase' during which school teams work to become more authentic and mature communities.

However, moving from a pseudo-community to an authentic professional learning community may well require knowledge of 'the dark, informal side of organizations' (Morrill *et al.*, 2003: 406 referring to Vaughan, 1999) and skills in managing it. Morrill *et al.*'s (2003: 391-415) extensive literature review describes the prevalence of 'covert conflict' in organisations and how this leads to unplanned and unintended change while undermining organisational stability and growth. However, they also argue that 'formal structures that facilitate voice will reduce covert conflict' (*ibid.*: 403 referring to Hebden and Stern, 1998, Sapsford and Turnbull, 1994). This is redolent of Hirschman's (1970) view that people need to be given a voice or they exit mentally and/or physically from an organisation, or as Morrill *et al.* (*op. cit.*) reveal, people can cause serious damage to organisations and its members. As people work to support, ignore or hinder

management initiatives or work processes, they are exercising a certain level of control and, as a result, it can be said that leadership is always a distributed phenomena. This view gains credence from Anderson and Berdahl (2002: 1363 referring to Gibb, 1985) who suggest that 'leaders are generally afforded power' by group members, 'who give them control over group resources.' PLC and DL initiatives are ways of gaining greater control over an organisation or an initiative by sharing power in a more overt manner. In principle, this should reduce the number of people working at cross-purposes and help increase coordinated actions to achieve jointly planned outcomes.

However, covert conflict needs to be uncovered, acknowledged and addressed for it is 'generative of information about what matters most to school stakeholders' (Flessa, 2009: 346). Thus, conflict can be seen as a key tool for fostering inquiry, for understanding what motivates people 'to join together in support or opposition of school initiatives' (*ibid.*). In a similar vein, Grossman *et al.* (2000: 45) propose that professional learning communities navigate the fault lines of difference and consider 'conflict as an expected part of group life.' Ekholm (2004: 109) suggests that 'living with tension and resolving conflict is an integral part of the democratic process and integral to school improvement'. However, many people and organisations are conflict adverse, and lack the skill in managing conflict in a constructive manner. Former Assistant Deputy Minister of the Ontario Ministry of Training, Colleges and Universities, Maureen Edgar, who trained Estonian immersion programme managers, suggested giving less voice to those people who have difficulty being constructive, and giving greater voice to those whose inquiry is the most thorough and aligned with the institution's agreed goals and vision.⁶²

Additional factors can also impinge on the building of professional learning communities. Harris and Muijs (2003: 19 referring to Barth, 1999) have identified inertia, over-cautiousness and insecurity as sources of resistance to building professional learning communities. Labianca and Brass (2006: 601-610) who have studied the power of social relationships in the workplace conclude that negative relationships can have greater power over an individual's career than positive relationships, thereby explaining one reason why people may be adverse to engaging in open and frank critical inquiry in work environments. Formal leaders may also lack the knowledge and skills to create an environment that fosters the distribution of leadership. Harris (2008: 27 referring to the PriceWaterhouse Cooper DfES report, 2007) claims that 'although some school leaders genuinely believed that they were distributing leadership, the feedback from teachers and support staff suggested this was not the case.' In addition, Malen and Cochran (2008: 168) argue that 'macro-forces may be controlling the agenda, limiting the latitude, restricting the scope of influence and otherwise circumscribing the power of site actors.' The difficulties faced by those working to distribute leadership and build professional learning communities imply a need for: strong intrapersonal skills; meta-cognitive and meta-affective awareness; group dynamics and teamwork and skills; conflict resolution skills; and, grounded professional confidence. According to Diamond (2007: 66-80) a professional learning community needs to have high expectations regarding the depth and breadth of learning to be achieved by all its members and for the quality of public and private discourse. Ultimately, professional learning communities call for complexity competence.

⁶²

Cf. Patterson *et al.* (2005) for a discussion of ways organisations and individuals can solve conflict.

Considering that ‘institutional arrangements are stubbornly resistant to change’ (Scott, 2000: 127), there is a need to understand the change process. Kotter (1996) details eight steps that characterise change: establishing a sense of urgency; creating a guiding coalition; developing strategy and vision; communicating the change vision; empowering broad-based action; generating short-term wins; consolidating gains and producing more change; and anchoring new approaches in culture. In contrast, Fullan (2001) proposes: maintaining a focus on moral purpose; understanding change; increasing coherence among various aspects of a planned change; relationship-building; knowledge creation and sharing; and building commitment among an organisation’s internal and external members (stakeholders). Bennet and Bennet (2008: 378-387) propose allowing professionals to undertake the changes they see fit. They (*ibid.*) believe that professionals should be encouraged to manage their own learning, and to plan change by taking into account the following factors: awareness, understanding, personal feelings and beliefs, ownership, empowerment and impact. Kotter, Fullan, and Bennet and Bennet all emphasise the dynamic nature of change, and the need therefore to foster learning and to some degree autonomy. DL and PLC initiatives seek to break resistance to change by helping people to take greater control over their situation.

Finally, professional learning communities and distributive leadership are likely to be culturally and temporally bound, and influenced by population size. Building a professional learning community focussed on developing a national immersion programme may have been simpler to accomplish in Estonia due to its small population than might have been the case in a much more populous country. In addition, the timing was propitious as the need for improving language-learning opportunities was apparent to several stakeholders and this was reflected in policy prescriptions (cf. chapter two). Furthermore, although it has not been extensively researched, the distance or gap in the workplace between those in positions of power in Estonia and others is thought not to be great. Mihhailova (2003:130) who studied multicultural teams in Estonian enterprises, and Vadi and Meri (2005: 279) who researched Estonian hotel staff concluded that the gap between those in positions of authority and other employees in Estonia is not large. This implies that employees in Estonia are more likely to voice their opinion to those in positions of authority than might be the case in countries where the gap is larger. This too may have facilitated dialogue within the community of people working to develop the Estonian immersion programme. Here again, timing may have played a role, as the building of the immersion programme coincided with a period of economic expansion. A period of economic decline might lead employees to be less frank.

Conclusion

Stakeholders, those people or organisations that can affect or be affected by an organisation, are not immediately self-evident. A systematic effort is required to identify them. For example, high-achieving, low-achieving, female and male students can all be considered as separate stakeholder groups, each with particular needs. Identifying stakeholders is a prerequisite to assessing and addressing their needs. The complexities of teaching/learning and managing bilingual education as discussed in the case of Estonia and in the literature review in the previous chapters imply

that the construction of quality learning environments requires skilful stakeholder cooperation with politicians, educators, trainers, parents, students, journalists, and other groups. Effective cooperation involves two-way and multi-directional communication, dialogue that is characterised by partnership as opposed to manipulation, planning tools to mediate discussion, balancing cooperative and assertive talk, and delivering outcomes that had previously been agreed upon. Sharing power is a hallmark of the approach. Further, the stakeholder approach at its best accords knowledge about practices that need to change and knowledge about how to do so a considerable measure of power. Shared knowledge takes on a form of positional power and influence, and thereby, a key role in leadership. Ultimately, the approach allows stakeholder groups including teachers and students greater control over shaping their own context.

The stakeholder approach can be complemented by professional learning communities and distributed leadership initiatives. These concepts can be used to create situational constructs that recognise the distributed nature of cognition. They can potentially motivate large numbers of stakeholders, including students, to act in a concerted manner to increase the learning of all PLC members bringing greater critical thought to bear in negotiating the construction of stable and emergent learning environments. PLC and DL initiatives are an act of power-sharing that requires leaders to become facilitators of learning. However, professional learning communities are not easily constructed as their members are engaged in a perpetual struggle with members from pseudo-communities. As pseudo-communities can leave the impression of being learning communities they are difficult to detect. In pseudo-communities teaching has been privatised by a difficult-to-penetrate cellular classroom culture. This acts as a barrier to critical inquiry and the building of authentic learning environments with high expectations for teachers and students.

Identifying, acknowledging and skilfully navigating conflict are central in moving from a pseudo-community culture to a professional learning community culture. By distributing leadership and power, leaders and communities are likely to generate constructive synergy and gain greater control over education, since in controlling environments individuals may covertly use the power at their disposal in a manner that undermines the community as a whole. This appears to mirror a similar dynamic in the classroom as discussed in the previous chapter. In addition, external factors such as high-stakes examinations (see the previous chapter) can act as obstacles to developing professional learning communities. Ultimately relationship-building and dialogue are central to educational change, as are meta-cognitive, meta-affective, meta-social strategies combined with a wide breadth of in-depth knowledge about fields as diverse as communication, bilingual education, and change management.

The next chapter explains the epistemological and ontological stance which underpinned the empirical study, as well as the methodologies used in the collection and analysis of data.

CHAPTER TEN: METHODOLOGY

This chapter outlines the epistemological and ontological stance which underpinned the empirical study, as well as the methodologies used in the collection and analysis of data. The thesis draws on the theories of moderate social constructivism, and complexity. The characteristics of each of these theoretical perspectives are identified, along with pertinent aspects of case study, action research and mixed methods. Data collection methods are described concomitantly with ethical considerations. Research goals and questions are surfaced for reflection and evaluation, and the ways in which data were analysed are explained.

Social constructivism

Social constructivists argue that meaning-making is a social process through which groups and individuals co-construct meaning through interaction. Rosen (1984: 1) refers to this process as ‘bargaining for reality’. As reflexive actors, individuals construct practices, behaviours, relations, ideas, attitudes, facts and their own reality (Hacking, 1999). However, though this social constructivist perspective would seem to suggest that knowledge of all of these is relative to geo-historical social practices, it is argued here that this knowledge has both subjective and objective elements. Searle (1996: 2) for example, makes a distinction between ‘brute’ and ‘institutional facts’. ‘Brute facts require no human institution for their existence’ while ‘institutional facts [...] require human institutions for their existence’ (*ibid.*). Institutional facts are social facts that at some level and in some way have been agreed upon in society. Although accepting that much of reality is socially constructed, Searle (*ibid.*) posits that in addition to social constructs there are ‘brute facts’. This avoids what Hacking (1999: 24 referring to Hacking, 1975: 182) describes as ‘linguistic idealism’, so that ‘only what is talked about exists, nothing has reality until it is spoken of, or written about’. In a similar vein, Nagel (1997: 14-15) points out that if everything is subjective, then that must include the concept of something subjective also being objective. This thesis rejects a ‘strong’ social constructivist viewpoint where ‘all attributes of human beings’ are ‘literally constructed by the discourses, institutional mores and traditions of [...] society’, but does adopt a moderate social constructivist perspective where ‘discourses, power networks and social arrangements [...] are inventions of groups of people in society and that these groups of people are stratified so that those who have greater control of resources in society’ have greater power⁶³

⁶³ Power in this thesis is defined as ‘an individual’s relative capacity to modify others’ states by providing or withholding resources or administering punishments. Resources can be both material (food, money, economic opportunity) or social (knowledge, affection, friendship, decision-making opportunities), and punishments can be material (job termination, physical harm) or social (verbal abuse, ostracism) (Keltner *et al.*, 2000: 5).

‘to determine future arrangements’ (Scott and Morrison, 2006: 223).

Whilst accepting its ubiquitous nature, it is possible to view power not just through the lens of self-interested struggle and as a brute force, but power can also be seen as a positive, productive force. Power then is both coercive and enabling, in the sense that in the first instance it is restrictive, and in the second instance it both allows the social actor to ‘carry on’ in life and has an emancipatory impulsion to it. In this viewpoint, the essential issues centre around how power is used and for the achievement of which outcomes. Power can be used in a non-coercive manner that allows for stakeholder engagement, competition and debate whilst remaining in the confines of morality (Gini, 2004: 36). For example, one can view humanity as a commonly held and desired outcome of life, and seek not to use power as the means for achieving only short-term and self-centred ends. In the long-term, the greater good of humanity has the potential to benefit both the individual and society at large. Keltner (2007: 16) argues that ‘a person’s power is only as strong as the status given to that person by others’ with groups according power to individuals who cooperate and are modest, as opposed to those who do not look after interests of their group. Thus, from Keltner’s perspective, it is in the individual’s own interest to invest in the greater good.

Bourdieu (1993: 73) sees all agents or stakeholders who ‘are involved in a field’ as sharing ‘a certain number of fundamental interests, namely everything that is linked to the very existence of the field.’ This is redolent of Näsi’s (2002) view that an organisation would cease to exist without its stakeholders. Such views imply that the power gap between leaders and others is reduced so that power is shared in a manner argued for by proponents of the stakeholder approach, professional learning communities and distributed leadership (cf. chapter nine). This also suggests an interdependency among stakeholders that in principle crosses gender, age, class, ethnicity and other potential influences on the acquisition of various forms of capital. However, Maner and Mead (2010: 495) referring to the intoxicating nature of power caution that power can be unwieldy and that ‘the people most likely to abuse their power may be the very people who desire it most.’ They argue that flat hierarchies, accountability structures, and fostering in-group cooperation and competition with out-groups can reduce the selfish use of power whilst also suggesting that much work remains to be done to understand what intrinsically and extrinsically motivates individuals to use power and for which purposes (*ibid.*).

A researcher is also entangled in power relations. Scott and Usher (2011: 19 referring to Fine, 1994) argue that ‘all researchers are epistemic agents, both embodied and embedded’ and ‘data can never be free of the preconceptions and frameworks of the data collector.’ This is because both epistemic and cognitive structures are socially constructed (Bourdieu, 1990: 131), and can therefore be considered to constrain and enable both the researcher and his or her research participants. Bourdieu (1993: 87) refers to the socially constructed nature of cognition as ‘habitus’, which ‘is a product of conditionings which tends to reproduce the objective logic of those conditionings’. Habitus as such would constrain critical thought. Habitus is also an instrument of power as some people can use their habitus to their advantage as this constitutes ‘knowledge and recognition of the immanent laws of the field’ (*ibid.*: 72). However, individuals are not necessarily aware of their habitus, or of how their knowledge and cognition are constructed or influenced. They may not

perceive of all knowledge being ‘a condensed node in an antagonistic power field’ (Haraway, 1988: 577). As a researcher, I have to recognise that both my own thinking and those who participate in my research are subjected to powerful external and internal forces and are thus structurally constrained, and that the final product of the research is socially constructed at multiple levels. Thus as a consequence, I have an obligation to be aware of complexities of power and to seek out its influences and to try to redress power imbalances that come to light in the research process.

Complexity theory

Complexity theory seeks to understand ‘how the interacting parts of a complex system give rise to the system’s collective behaviour and how such a system simultaneously interacts with its environment’ (Larsen-Freeman and Cameron, 2008: 1). Complexity theory proposes that societies and stakeholders ‘exist in symbiosis’ and that ‘phenomena must be looked at holistically’ (Cohen *et al.*, 2007: 33). It implies ‘radical relationality’ with everything existing in relation to something else (Dillon, 2000: 4). Morin (1992: 130-131) sees complex systems driven by ‘autocausality’ or ‘recursive causality’. This is redolent of an ecological view where all phenomena on the planet are inextricably tied together, and possibly the planet with the universe, and the universe with the multiverse.⁶⁴

Complexity theory understands phenomena as: emergent with the possibility of an individual agent who is not a governing leader influencing a complex system; self-organised in a spontaneous manner; nested within other unities meaning that they are influenced by context; ambiguously bounded for complex unities exchange matter and energy; organisationally closed for a complex organisation’s internal patterns endure and are stable; having in the physical sense close relationships for most information is exchanged among neighbouring individuals; lacking in equilibrium for complex systems die when they achieve long-term, stable equilibrium; and changing in structure for unities adapt and seek to remain viable (Davis and Sumara, 2006: 5-6). Larsen-Freeman and Cameron (2008: 7) bring an additional layer of nuance to the dynamic contexts in which complex systems are embedded, by stressing that ‘humans can shape their own contexts.’ Similarly Byrne (2009: 4) argues that social contexts ‘are transformed interactively by intervention.’ Byrne (*ibid.*) goes on to suggest that ‘interventions interact with the agency of those in the social context where the intervention is applied.’ This fits with a social constructivist perspective where individuals jointly negotiate and co-construct, within certain constraints, their worlds.

For the researcher, complexity theory involves searching for multiple perspectives and using participatory forms of research and case studies whilst focussing on a large web as a unit of analysis and simultaneously seeking out recurring variables that can explain how a complex system functions (Cohen *et al.*, 2007: 33-34, 247). Kuhn (2008: 177-178) calls on the researcher to bear in mind that complexity in and of itself is not meaningful, but that it provides a ‘catalytic’ framework for

⁶⁴ Cf. Carr (2007: 3-28) for an overview of the concept of multiple possible universes or multiverse.

developing 'complexity habits of thought' and fostering critical thinking. Moreover, even though complexity seeks to synthesise all known phenomena, both the phenomena and theory are emergent (*ibid.*: 179). The theory recognises the power of stakeholders to change systems and for the theory itself to evolve. Osberg (2008: 144) considers complexity as 'characterized by a *logic of freedom*'. Complexity theory presents not only a challenge to educational researchers, but also offers 'a nexus between macro and micro research in understanding and promoting change' (Cohen *et al.*, 2007: 33).

Case study

Case studies focus on a given unit or phenomenon and are characterised by their 'bounded' nature (Gerring, 2007: 33; Merriam, 1998: 19). The bounded case, however, remains embedded in its real-life context (Flyvbjerg, 2001: 136; Simons, 2009: 21) to such an extent that the 'boundaries between the phenomenon' under study and its 'context are not clearly evident' (Yin, 2009: 18). Cases can consist of 'persons, events, decisions, periods, projects, policies, institutions, or other systems' and these elements are studied 'holistically by one or more methods' with the aim of drawing out their complexities (Thomas, 2011: 23). By implication, case studies seek to capture these complex elements and as such are not only bounded by them, but in some way by time. The elements being researched predate the given case study. They have not been created as an artificial subject of research, but constitute 'naturally occurring situations in which variables are not, or cannot be controlled' by the researcher (Scott and Morrison, 2005: 17).

The Estonian immersion programme as a whole began to emerge through discussions in 1998, with four schools introducing an early immersion programme in 2000. In this study the case is temporally bounded by the start of the process (i.e. 1998) that led to the development of a national immersion programme and the end of the fieldwork in 2010. Embedded in this study are four smaller cases – the four schools which launched a late immersion programme in 2003. 'It is common to combine several cases in a case study' (Gerring, 2007: 27). The schools were studied during the academic year 2007/08. This offers what Thomas (2011: 149) refers to as a 'snapshot' of practices, beliefs and understandings as they were perceived by the research participants during that given academic year. Gerring (2007: 19) argues that in case study research temporal boundaries tend to be less apparent than spatial boundaries. The spatial boundaries of the case of the Estonian immersion programme and the embedded cases of the four schools are more easily delineated than their temporal boundaries. For example, the Estonian immersion programme was managed nationally by an Immersion Centre that had a clear and unique mandate. The Centre worked with schools that went through a predefined process to join the programme. However, on the temporal plane, there is greater fluidity in boundaries. The majority of documents analysed in the thesis were created between 1999 and 2005 whilst the interviews with decision-makers took place in 2009-2010. The lesson observations at the four schools took place during 2008 whilst interviews with school headteachers and their deputies took place during the academic year 2007/08. The sample and research methods will be discussed at greater length later in this chapter.

Scott and Morrison (2005: 20-22) identify five major concerns pertaining to case studies: they interact with their context and as such they are not clearly bounded independent units; they do not allow for generalizability of findings to other contexts; causal analysis is complicated by the difficulty of drawing out contingent and necessary relationships; and, it is a challenge to capture the authentic. Suter (2006: 321) also argues that case study is normally not used for generalisation, but suggests that it lends itself to building a narrative about a particular situation. Case studies commonly seek to uncover rich details about the case and its context, and thereon to build rich narratives. They seek to capture 'multiple realities' and 'contradictory views' (Stake, 1995: 12). Thus, one of the primary aims of case study research is to give voice to the people under study (Thomas, 2011: 7). The richness of description can help others to decide whether the case in question has an authentic application in their own context and whether they wish 'to use ideas embedded in the research' in their context and in their own manner (Suter: 2006: 321).

As with most forms of research, case study requires rigor to ensure that key features of the case are explored, that data is collected according to accepted norms, that data is triangulated, that analysis is sound and plausible, that arguments are well constructed making links to relevant research, and that research is well documented and open for others to 'validate or challenge' (Bassey, 1999: 58; Thomas, 2011: 61-71). Suter (2006: 321) and Yin (2003:10) concur suggesting that researchers use and triangulate data from multiple sources. In a similar vein, Scott and Usher (2011: 95) argue that by using several tools such as observations, semi-structured interviews, surveys, respondent validation exercises, researchers can reduce 'distortion and produce a more authentic portrayal' of a complex situation. Moaz (2002: 164-5) suggests that it is essential for the researchers to detail how the research was conducted, that a rationale be provided for why the study was undertaken, and that the ways that data are processed and analysed are made clear to the reader.

Action research

Action research is centred on practitioners researching their own practices, collaboration with those who are at the focus of that research and on the use of research results to improve practices. The central tenets of action research are '[i]mprovement and involvement' (Robson, 2011: 188). The improvement is in understanding, in practices and in the situation within which the practice takes place (Carr and Kemmis, 1986: 162). Action research can be conducted by an individual or collaboratively. McNiff (1988: 45) points out that action research is steeped in complexity and 'messiness'. Senge and Scharmer (2006: 204) who explore community action research, where an entire community of practitioners engages in a joint research initiative, also consider this form of research complex and messy. They point to three layers of complexity which need to be navigated: 'dynamic complexity' referring to the extent to which causes and effects can be identified, and their distance in time and space; 'behavioural complexity' referring to people's values, mental models, aims and political motivations; and 'generative complexity' referring to tensions between current versus emerging realities (*ibid.*).

Action research is considered compatible with traditional research methods (Scott and Morrison, 2006: 4) and ‘flexible’ (Scott and Usher, 2011: 47). It typically includes a cycle that involves a stage of inquiry, problem formulation, planning, data collection and analysis, reporting results, deciding on and taking action, and finally often launching a new cycle (Cohen *et al.*, 2007: 300). In a distilled form this is redolent of Kolb’s (1984: 26) learning cycle that involves having an experience, reflecting on it, learning from it and trying to apply the learning. However, Scott and Morrison (2006: 6-7) raise several concerns regarding action research: researchers may be too close to their situation to be able to view it objectively; results may be very context dependent and thus not generalisable; other contexts may not be as receptive to change; and data may be misused. They call for rigorous research practices to be applied which can help counter some of these concerns.

This thesis can be considered a form of action research on two levels. First, I have researched the development of the Estonian immersion programme of which I was a co-manager. These actions were plotted primarily in chapters two and three, and have also been referred to in subsequent chapters. Second, as the research study was financed by the EMER and the results presented to the EMER and the research participants, the study can be seen as part of a larger process of collaborative inquiry through which the EMER and other stakeholders in immersion education were seeking to learn about and improve their own practices. As someone who still occasionally provides training for and continues to collaborate with stakeholders in the Estonian immersion programme, I have some opportunities to apply the learning within the context in which it occurred. The next two chapters use data from four schools implementing the late immersion programme and from decision-maker interviews to determine whether those practises described in chapters two and three and in the literature review are being applied in the classroom and are considered valid in the minds of parents, students, teachers, deputy headteachers and headteachers.

Mixed methods

Each and every method of research has its limitations. Shulman (1986: 4) cautioned that research that is based on only one perspective tends to ‘illuminate some part of the field [...] while ignoring the rest [...] and that [...] [t]he danger for any field of social science or educational research lies in its potential corruption (or worse, trivialisation) by a single paradigmatic view.’ Mixed methods seeking both quantitative and qualitative data and possibly using more than one theoretical perspective can help address this concern. Robson (2002: 370) argues that mixed methods can contribute to a ‘reduction in inappropriate certainty’ on behalf of the researcher who may be misled by a more restricted data set or a single perspective into believing he or she has ‘found the ‘right’ answer’. According to Byrne (2009: 3) a combination of quantitative and qualitative research is ‘a particularly fruitful mode for investigating complex systems’. Lorenzo *et al.* (2011: 450-451) see bilingualism and bilingual education as complex issues requiring complex research methods including non-linear and mixed approaches. Moreover, establishing the Estonian-language immersion programme can be considered, by virtue of the number of stakeholders and

the investments made into its development (cf. chapters two and three), as a particularly complex undertaking.

‘The use of multiple methods to study a single problem’ is referred to as triangulation (Patton, 2002: 247). Triangulation can also be seen as a way of submitting one piece of data to ‘cross-examination’ by another piece (Cheng, 2005: 72). In addition to using different types of research data for triangulation, mixed theories (using multiple theories to interpret data), mixed methodologies (using more than one method to research one problem), and mixed investigators (using more than one researcher) can also act as instruments of triangulation (Denzin, 1978: 297-302). Furthermore, each of these means or ways of structuring triangulation can also be viewed multidimensionally – horizontally across these various means of triangulation and vertically within each mode. Easterby-Smith *et al.* (2008: 419) point out that although quality in research is ‘situated in methodological pluralism’ through the comparison of sets of qualitative and quantitative data, it is also important to take a qualitative and quantitative perspective inside of each of those data sets. Similarly, if a researcher was to draw on more than one theory for data collection and analysis, he or she would also be advised to take a quantitative and qualitative perspective within and across each of those theories. In comparison to using only one method, mixed methods generate additional data and provide additional conceptual lenses for data analysis: they enhance opportunities for triangulation (Scott and Morrison, 2006: 157). In this Estonian study, the application of mixed methods has meant: a) drawing on a diverse set of professional literatures (bilingualism, bilingual, economics, education, educational reform, foreign relations, linguistics, management, neuroscience, pedagogy, philosophy, psychology and sociology); b) using a mix of theories (social constructivism and complexity); c) interviewing and/or questioning a large number of stakeholders and a mix of stakeholder groups; d) analysing data across and within data sets; and e) generating and analysing quantitative and qualitative data.

Although mixed methods are suitable for researching complex systems, their use by researchers also implies that they understand knowledge and reality as complex and not easily captured. Johnson and Onwuegbuzie (2004: 14) view pragmatism as an ‘attractive philosophical partner for mixed methods research’. Pragmatism avoids dichotomies such as rationalism versus empiricism and objectivism versus subjectivism, while accepting the fallibility of current beliefs and research conclusions, recognising both brute and social facts, rejecting reductionism and accepting the emergent nature of the world (*ibid.*: 18). In a similar vein, Johnson (2009: 451, 449) argues that researchers choosing mixed methods ‘generally reject either/or logic’ and tend instead to look at issues as being ‘complex wholes’ and advocate thinking in terms of continua on multiple philosophical and methodological dimensions.’ Further, Johnson (2009: 452) argues that in educational research objects or subjects of study ‘have embedded value components that are not readily separable from their factual components’ stating that well conducted research can produce at best what Dewey (1938: 54) referred to as ‘warranted assertions’. This reflects Weber’s (1962: 39) view that ‘an interpretation of a sequence of events’ can at best be ‘causally adequate’. If mixed methods researchers do not generally seek ontological and epistemic certainty, they do take positions and make assertions that, based on well-grounded and thorough research and inquiry,

can have a strong measure of validity (Lewis and Ritchie, 2003: 27). The researcher also seeks to take a broad view, doing in-depth data analysis in order to expand understandings of the object/subject of the research.

Research questions

My research aim was to identify the pedagogical and management practices that have contributed to the development of sustainable immersion programming. As the Estonian immersion programme is considered 'one of the most [...] carefully planned programs of immersion in Europe and, indeed, around the world' (Genesee, 2003: 17) this objective has the potential to not only draw out the measures taken, but also stakeholder perspectives and actions; pedagogical practices, actions and behaviours; and management practices, the mechanisms and actions that have contributed to the development of the immersion programme in general, and the late immersion programme in particular.

In doing so I also sought to uncover the forces and mechanisms that have driven programme development and stakeholder cooperation, as well as the extent to which student, parent, teacher, headteacher and deputy headteacher opinions regarding best practices in late immersion programme pedagogy and management are aligned within and across these stakeholder groups. In addition, I examined the role of power in stakeholder relations. Finally, I sought to determine the extent to which best practice in teaching in bilingual education is applied in classrooms.

Research sample and overview of methods

The sample consists of Immersion Centre documentation and 15 Estonian immersion programme decision-makers. It also includes me and my memories of how the Estonian immersion programme was developed. Part of this evidence from this sample was presented in the historical overview of the Estonian immersion programme in chapters two and three. The sample also includes four Russian-language schools in Estonia that offer a late immersion programme. The names of the schools have been changed to afford a measure of anonymity to the respondents. Two of these schools (Maple Gymnasium⁶⁵, Ash Gymnasium) are located in Tallinn the capital city of Estonia. Both schools in Tallinn are located in neighbourhoods with large Russian-speaking populations. The other two schools (Oak Gymnasium, Birch Gymnasium) are located in the northeast of the country. Birch Gymnasium is the only Russian-language school in its community. Oak Gymnasium is located in a predominately Russian-speaking city. Oak Gymnasium is considered an elite, prestigious school where parents often compete to place their children, while the other three schools have large populations of low SES pupils (Käosaar, 2010).

⁶⁵ An Estonian gymnasium is a school that offers twelve years or Grades of instruction, not including kindergarten.

In each of the four schools the following stakeholders were included in the sample:

- 1) All late immersion students in Grades eight and nine (160 students of whom 147 were present on the day they were surveyed and who all completed a questionnaire);
- 2) The parents of students in Grade eight and nine (160 parents of whom 77 returned completed questionnaires);
- 3) Teachers teaching through Estonian in the late immersion programme (40 teachers of whom 27 returned completed questionnaires);
- 4) Eight school managers (four headteachers and four deputy headteachers responsible for the immersion programme).

The following qualitative and quantitative methods were used:

- 1) Questionnaires:
 - a) written questionnaire (for students, parents and teachers);
 - b) a face-to-face interview based on a written questionnaire that was supplemented by follow-up questions arising during the interview (for each school headteacher and deputy headteacher);
- 2) Lesson observations and my notes based on those observations (51 lessons);
- 3) Interviews with 15 key decision-makers (government officials and politicians);
- 4) Action research by acting as my own informant recounting memories whilst empirically grounding those in documents and stakeholder understandings;
- 5) A review of Immersion Centre documents (annual reports, planning instruments and minutes).

Questionnaires

Although each questionnaire will be discussed separately, some features common to all or most questionnaires are presented first. I drafted all of the questionnaires in Estonian and English. All the English-language questionnaires were reviewed for fitness for purpose including for their reliability, validity, and for clarity of language by two academics at the University of London and suggestions for change were incorporated. The parent, teacher, and headteacher and deputy headteacher questionnaires were based on ones used to study early immersion programme sustainability in Estonia (Asser and Mehisto, 2005). This was done because they had been well vetted and successfully used, and they would allow for comparisons of data from 2005 with this new study. The English-language versions of the previously-used questionnaires had been reviewed by one academic at McGill University and two at the University of Toronto for fitness for purpose.

Estonian to Russian translations of the parent and student questionnaires were made by a translator who had a long history of working with the Immersion Centre. Two or more Immersion Centre staff checked all Estonian and Russian-language questionnaires for fitness for purpose and clarity

of language. Suggestions to increase clarity were incorporated. The Russian-language versions of the student and parent questionnaires were also checked and approved by two representatives of the Estonian Association of Immersion Parents (EAIP).

The headteachers of the four schools agreed to the study. Parents were informed by the schools of the research. The parent questionnaire included a letter informing parents that the students would be surveyed. The people and organisations who vetted the questionnaires and approved the research are all charged with protecting young people and as such several layers of protection were offered to students to take into account that some or all of the students could be considered in some way 'vulnerable' (BERA the British Education Research Association, 2004: 7).

Student questionnaire⁶⁶

The student questionnaire was based on a questionnaire that had been developed and tested by Chambers (1999: 217-233) through shortening and adapting it to the Estonian context by removing references to non-applicable languages and examinations. All four schools dedicated one 45-minute lesson in the spring of 2008 for students to fill in the questionnaire. I administered it. After introducing myself I explained, in Estonian, the purpose of the study (to support programme improvement), why I was asking for the students' participation (to provide them with an opportunity to influence change), who else was participating in the study, who financed the study (the EMER), that they should not write their names on the questionnaire so their anonymity could be protected, how the data would be used, how they would be given feedback on my interpretation of the research results, that their participation was voluntary, and that the EAIP had reviewed the questionnaire. The same information was provided in writing in Russian. I verbally added that any student who changed his or her mind about participating in the study while answering the questionnaire was free to do so, and that all the questions did not have to be answered, but that I would appreciate them doing so. The detailed explanation and the commitment to provide students with feedback on the study can be seen as a sign of respect towards the participants – a commitment that was later met by going to each school to report back my research results. These measures were taken so as to avoid harm to the participants and to ensure that 'voluntary informed consent' (BERA, 2004: 6) was obtained. The measures gave students a voice and accorded them 'respect [...] dignity and confidentiality' (Pring, 2000: 142-143).

The student questionnaires were in Russian and consisted of 25 questions – 16 multiple-choice questions, 9 open-ended questions. Students answered the survey questions in silence. The teachers were present, but did not walk around the classroom or comment on the questionnaire. One question was asked in one school about how to interpret a Likert scale, which I answered. All students who were in attendance answered the questionnaire mostly taking the allotted 40 minutes to do so.

⁶⁶ Cf. Appendix K.

Parent questionnaire⁶⁷

The Russian-language parent questionnaires were given to students in unsealed envelopes to take home to their parents in the spring of 2008. The questionnaires included a covering letter explaining the same points as in the student letter. Parents were also informed that their children would also be surveyed primarily to ask for their learning preferences, their opinions and their attitudes towards immersion, and that their child's (children's) participation was strictly voluntary as was theirs. They were also told that the EAIP had approved the student questionnaire and that the study included lesson observations. My name and email address were on the letter, as was the telephone number of the Immersion Centre. Parents were invited to telephone the Centre with questions or concerns. The secretary at the Immersion Centre told me that no calls were received pertaining to the study.

The parent questionnaire consisted of 16 questions – 13 multiple-choice questions, 3 open-ended questions. Four multiple-choice questions also provided an option for parents to add their own choices or to make a comment.

Teacher questionnaires⁶⁸

Two native Russian-speaking teachers met with me and piloted the Estonian-language questionnaire to help ensure that non-native speakers would not face difficulties in answering it. Suggestions for improving clarity were incorporated. Similar information was provided in the Estonian-language letter accompanying the questionnaire as in the student and parent questionnaires. Teachers were reassured that their anonymity would be guaranteed and that only synthesised data and analysis thereof would be presented to the EMER and the schools. My name and e-mail address were provided. Questionnaires were distributed to the teachers directly by the researcher, by the deputy headteacher or from one teacher to another in the spring of 2008. Completed questionnaires were returned by mail directly to the researcher care of the Immersion Centre in the stamped and addressed envelopes provided by me, or in person to me, or were handed to the school secretary or to the deputy headteacher.

The teacher questionnaire consisted of 27 questions – 16 multiple-choice questions, and 11 open-ended questions. Nine out of the 16 multiple choice questions also provided an option for teachers to add their own choices or to add a comment.

⁶⁷ Cf. Appendix L.

⁶⁸ Cf. Appendix M.

Headteacher and deputy headteacher (school manager) interviews

As the choice of time, place and seating can be considered as part of the politics or power plays impacting on interviews (Limerick *et al.*, 1996: 454), I chose to demonstrate flexibility by having schools pick the place, time and seating arrangements in order to give school managers maximum control over the interview. Two interviews were conducted over a period of several weeks as headteachers did not have the time to meet for more than an hour at a time. Two headteachers and one deputy headteacher asked for and were provided with copies of the questions in advance of the interview.⁶⁹ The interviews took place over a three-month period from December 2007 through to February 2008.

The interviews took place in either the headteachers' or deputy headteachers' offices or in an empty classroom. All interviewees except for one came out from behind their desks and sat at a table with me at an approximate 45-degree angle. I interpreted this as a gesture of friendliness and as a demonstration of their sense of security. The office of the person who did not come out from behind his/her desk was very cramped. Interviews lasted for two to four hours. Interviews were conducted in Estonian. However, one headteacher chose to answer some questions in English and some in Estonian. Of the eight interviewees five spoke Estonian with native-like or near native-like fluency, and the remainder were able to make themselves clearly understood in Estonian.

Prior to the interviews I provided school managers with the same background information about the research study that I had provided teachers with. The structured part of the interview was based on a questionnaire that consisted of 19 open-ended and 13 multiple-choice questions. Participants were given an opportunity to comment on any questions or answers. A dialogue arose based on the planned questions. The interviews were not recorded as I feared this might make participants less likely to speak freely. I took notes.

Decision-maker interviews

The following 15 decision-makers were interviewed: the Minister of Education and Research (Tõnis Lucas); two former Ministers of Education and Research (Mait Klaassen, Toivo Maimets); two former Ministers for Population Affairs (Paul-Eerik Rummo, Katrin Saks); a Member of Parliament who helped launch the EAIP (Indrek Raudne); the former Secretary General of Ministry of Education who helped launch the early immersion programme (Georg Aher); two senior officials at the EMER – one was the former manager of the Immersion Centre (Irene Käosaar) and current Head of the Ministry's General Education Department, the other was the former Head of the Ministry's General Education Department, as well as a member of the Immersion Centre's steering committee, currently a senior Ministry Adviser (Epp Rebane);

⁶⁹ Cf. Appendix N.

a former EMER official who was the person responsible for managing the early and late immersion initiatives (Auli Udde); the Director of the Integration Foundation whose organisation provided a legal framework to the Immersion Centre for its operations (Tanel Mätlik); the Director of the Immersion Centre during the time this research study took place (Natalja Mjalitsina); the former Head of Training for the Immersion Centre who left the Centre during my research study (Evi Möttus); the Head of Learning Materials Development at the Immersion Centre (Kai Völli); the Head of the Canadian Embassy Office in Tallinn (Marina Asari). Ten people were interviewed in person. Those interviews were recorded. Five people preferred to respond in writing.

Mailis Reps, the former Minister of Education, did respond to a written request to answer questions several months after the fact. I forwarded the questions, but never received an answer. Reps was the Minister during whose tenure the Immersion Centre found its financing temporarily suspended.

Interviews were based on twelve questions which were asked of all the participants.⁷⁰ The remainder of the questions arose during the conversations regarding the original twelve questions. The majority of interviews lasted 45 minutes or longer. The shortest interview was with the Minister of Education and Research. The Minister, who was undergoing budgetary negotiations, allotted 30 minutes for the interview. Respondents chose the location, with most interviews taking place in the respondents' offices. Only in one case, did a person remain behind his desk, all others came out from behind their desks and sat with me at a 45 degree angle.

Lesson observations

I conducted 51 lesson observations in the spring of 2008. Although initially planning only to attend Grade eight and nine lessons, I chose to also observe Grade six and seven lessons, as I was otherwise unable to find sufficient classes taught through Estonian. A minimum of 12 lessons were observed in each of the four schools over a two-three day period.

I asked each teacher if I could observe the class and explained why I was doing the study. I also stated that I would never share data about any one class with the headteacher or deputy headteacher or the Immersion Centre. I sat at the back of the classroom and took notes. Occasionally, I stood if I wanted to get a better view of a student's work. In most classrooms the teacher introduced me and I explained very briefly to the students what I was doing. After lessons I thanked the teachers, but did not provide any feedback on the lessons.

I chose not to audio record classes as I was concerned that this could impact too greatly on the lessons. I chose instead to take notes. During many lessons the exchanges were slow enough or limited enough to record full monologues/dialogues and descriptions of activities generating on

⁷⁰ Cf. Appendix O.

average two to three pages of typed notes per lesson. When speech was delivered more rapidly numerous gaps in recording occurred; however, these lessons each generated five to six pages of notes. Immediately after each day of observations I reviewed the notes adding short descriptions based on memory. No further changes except for spelling were made to the notes. I had also listed the following prior to the observations as objects of interest: use of L1, use of L2, use of peer cooperative work, use of content scaffolds, use of language scaffolds, sharing of content, language and learning skills goals/outcomes, use of questions requiring critical thinking, use of the initiation-response-feedback pattern, student engagement in learning, use of the four skills (listening, speaking, reading, writing). Use of these practices was noted.

Document analysis

I reviewed Immersion Centre annual reports, work plans, strategic plans and minutes from meetings in order to obtain evidence of stakeholder cooperation, power-sharing, and systemic planning, as well as of mechanisms and actions used for programme development.

Data analysis

All the data from teacher, student and parent questionnaires was entered into MS Excel tables that had built-in controls and formulas for data input validation. Data were cleaned, checked, imported into SPSS, unified and coded for analysis. Primary methods of analysis consisted in determining the mean and a comparison of means. Graphs were created based on frequency tables. Correlations and the determination of their significance were calculated using Spearman's correlation coefficient with two-tailed significance tests (Vogt, 2005: 330). The significance level for analysis was 0.05. All entries with missing values were eliminated from pair-wise analysis.

Although interview, lesson observation and document analysis data went through a process of qualitative analysis, quantitative data were also drawn from these data sets and analysed in conjunction with the quantitative data. In particular all 51 observed lessons were plotted on the Y axis with the teaching practices (features of successful immersion programmes) on the x axis on four 1.5 metre by 1.1 metre wall charts. Additional practices that emerged such as teachers making unsolicited comments about the ability of their students were added to the X axis of the charts. The wall charts allowed for quantitative noting of the use of various practices and space for qualitative observations and analysis.

Data analysis included a process of mixed methods inquiry using the following logic: abduction '(uncovering and relying on the best of a set of explanations for understanding one's results)', deduction '(testing of theories and hypotheses)' and induction '(discovery of patterns)' (Johnson and Onwuegbuzie, 2004: 17). Abduction and deduction were used to build understanding and

induction to verify those understandings. That means that understandings, themes and theories were allowed to arise from the data whilst patterns that revealed themselves were used to confirm or reject emerging understandings, themes and theories. Furthermore, I made a concerted effort to 'go back and forth seamlessly between statistical and thematic analysis' (Teddle and Tashakkori, 2009: 8). In addition, I worked to maintain a balance in showing data and interpreting data as suggested by Pratt (2009: 486) in order to allow the data to speak for itself. By using data in this manner as a 'self-correcting' mechanism (Cohen *et al.*, 2007: 7), this helped me reduce the likelihood of 'confirmation bias' (Johnson and Onwuegbuzie, 2004: 15 referring to Sandelowski, 1986). Furthermore, data was triangulated within and across data sets. For example, data from the headteacher and deputy headteacher interviews were triangulated with data from teacher, student and parent questionnaires as well as with lesson observation data. Themes and hypotheses arising from one data set were tested 'on another by constant checking and comparison across different sites, times, cases, individuals' and through an analysis of data that deviated from the norm (Lewis and Ritchie, 2003: 275), while also seeking to balance deviating responses with understandings from research that point to a bias toward negativity in open-ended questions among dissatisfied respondents (Poncheri *et al.*, 2008: 625).

Data were also revisited through the conceptual lenses of moderate social constructivism, and complexity theory. Furthermore, stakeholder actions were compared with actions and documents to determine degrees of alignment. Data were triangulated across stakeholders, and stakeholders were given an opportunity to confirm or reject and provide their own analyses of my key conclusions. I shared my research findings with staff and students at each of the four schools under study. I encouraged staff and students to engage in dialogue about these findings. Some of their comments are included in chapters eleven and twelve. Furthermore, I submitted a 54-page public report on my research to the Ministry of Education and Research (EMER). I presented the report at a public forum organised at the Ministry to which all immersion schools were invited to send representatives. The report was placed on the EMER website several days before that meeting and in 2011 remained available on the Integration Foundation's website. In addition, I provided a five-page overview of my research that was published in the EMER's Yearbook (EMER, 2010). In addition data and analyses were made available in several peer-reviewed publications to help ensure that they were 'open to scrutiny by fellow professionals' (Cohen *et al.*, 2007: 7).

Summary

This chapter explained my epistemological and ontological stance which underpinned the research project. To do so, it used the conceptual lenses of moderate social constructivism, and complexity theory. Research questions were presented. Methodologies used in the collection and analysis of data were described as were the use of case study, action research and mixed methods. The following two chapters will present and analyse research data thematically grouped under the headings: pedagogy and management.

CHAPTER ELEVEN: PEDAGOGY

This chapter presents and analyses research data based on notes made during lesson observations and, in part, correlates this with data from teacher and student questionnaires. Analysis is provided of the extent to which teaching and learning practices are aligned with the features of successful bilingual education. The numerical and qualitative richness of data as they relate to each feature has determined which of these is discussed in depth and which ones receive less attention or which ones are not discussed at all. The data is used to draw out themes pertaining to teacher pedagogical practices, teacher and student actions and behaviours, and the dynamics of teacher-student relationships.

As argued in chapters four-seven, effective learning environments in immersion education use the L2 as the medium of instruction for at least 50% of content classes whilst also allowing for the judicious use of the L1 in those classes. Effective bilingual learning environments also foster students' L1 development. This focus on two languages, and the development of 'language-sensitive' teaching and learning (Wolff, 2011), requires the building of students' and teachers' language awareness in both the L1 and L2. This awareness is not only aimed at helping students to acquire a command of grammar and to develop metalinguistic awareness, but it is driven by a recognition of the interdependence of language and cognition, and the need for the regular, systematic and long-term teaching of L2 and L1 academic language. It also invites the development of communication awareness through the co-construction of dialogic classroom discourse that gives students a substantial voice in discussions. In addition, a sufficient sense of psychological security is needed for students to actively experiment with content, language, and learning skills. This is, in part, tied to teachers and students having constructive and positive relationships. Also, in order for students to develop intercultural skills and to build authentic opportunities for using the L2, contact and communication with L2 speakers is planned for and encouraged.

Additional opportunities for authentic language and content learning are created through the ongoing integration of content, language and learning skills both in content and language classes. This involves teachers and students drawing relational links between these three elements, and teachers helping students to connect new intended learning with their existing knowledge, attitudes and skills, and their community, as well as the L1 and L2 cultures. Cross-curricular projects also help students to integrate knowledge. Central to the development of authentic learning environments and learner autonomy is the articulation and discussion of intended content, language and learning skills outcomes, and discussion of the learning process and of progress made in meeting intended outcomes. It is a prerequisite for students to know what is expected of them if they are to manage their own learning. In addition to making intended and actual learning more visible, this discussion

about learning outcomes and progress made in meeting them can constitute an act of formative assessment leading both teachers and students to change their practices. By building autonomy and sharing power with students regarding learning activities and processes, teachers are likely to foster increased student engagement. Student engagement is not only encouraged by many of the above measures, but by all teachers having high expectations for all students in relation to language, content and learning skills development. Engagement can be further encouraged through well structured peer cooperative work, engaged reading strategies that encourage students to use a text in several different ways and for different purposes, and by fostering critical thinking. Finally, the additional cognitive demand of learning content through the L2 calls for the provision of rich scaffolding for content, language and learning skills development.

Language use

In Grades seven and eight all subjects with the exception of Russian and English are, based on an agreement with the Immersion Centre, to be taught in Estonian. In Grade six 33% and in Grade nine 60% of instruction is to be offered through Estonian. Despite expanding the sample to include Grades six-nine, I was unable to find sufficient classes taught through the L2. Based on lesson observations and discussions with school managers, it can be concluded that Birch Gymnasium was offering the full complement of classes taught through Estonian, whereas the three other schools were not. On one of the days spent at Birch Gymnasium two immersion teachers were absent as they were training other teachers elsewhere and three of their lessons were taken by teachers choosing to teach through Russian. In Maple and Ash gymnasias several teachers were choosing to teach primarily through Russian, but were using substantial amounts of Estonian. Of the total 51 lessons observed, 30 were taught virtually entirely through the medium of Estonian, seven through Russian and Estonian, 13 virtually entirely through the medium of Russian, and one through the medium of English.

In addition, 27 out of 40 teachers designated by school managers as teaching through Estonian responded to the research questionnaire. These 27 teachers reported varying degrees of Estonian-language use in their immersion classes (cf. Figure 11.1) One teacher indicated that six percent, another ten percent, and yet another that 80% of their immersion class was being taught through Estonian. Eight teachers reported 90% and ten indicated that 100% of instruction took place through Estonian. Six teachers chose not to answer this question. As the expectation from the Immersion Centre was that immersion classes be taught virtually entirely through the L2, and as no other question on the survey had such a low response rate, it is possible that these six teachers were not using the L2 100% of the time. The fact that the 2003 agreement regarding L2 use was not being fully implemented in 2008 suggests that this agreement is dynamic and subject to newly emergent understandings and that both teachers and schools managers feel varying degrees of affiliation to it.

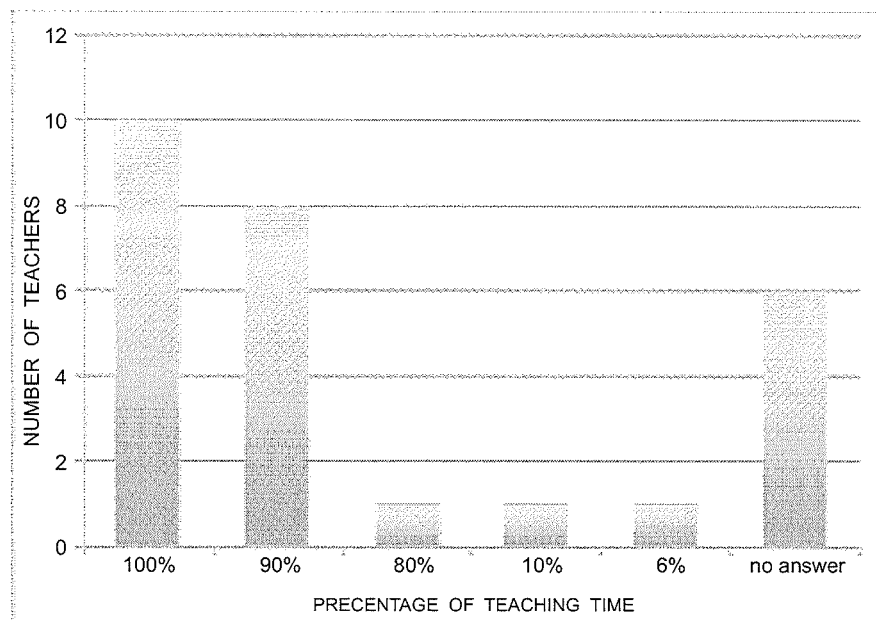


Figure 11.1. Teacher-reported Estonian-language use in their immersion classrooms

Teachers supporting content learning

Of the 37 lessons taught through Estonian or through Russian and Estonian, 26 were content and 11 language lessons. Language and content learning were primarily supported through student engagement in meaningful and challenging tasks that required the use of both content and the Estonian language. In addition, in lessons with high levels of student engagement, high levels of teacher-student ‘affiliation’ (Pennington, under publication) was evident. This primarily took the form of commitment to the learning of all the students and the building of a psychologically safe learning environment.

For example, in a Grade nine Mathematics lesson 15 Russian-speaking students and their teacher, a native speaker of Estonian, were engaged in constructing a rich learning environment through the medium of Estonian. The lesson began with the teacher saying ‘we have a guest’. She asked the students to say hello. They did so, as did I. She asked me to introduce myself. I did so and offered to answer questions; however, there were none. The decision to introduce me was respectful of the students as it demonstrated their right to know what was going on in their classroom. This reflected a positive teacher-student relationship.

The teacher then informed the students that after one minute of individual revision they would be defining mathematical terms. All 15 students swiftly opened their books or notebooks and began to revise in complete silence. After exactly one minute the teacher asked the students to stand up and form a circle. The students were told: ‘Hands facing up. Above the persons’ hands that you

are next to.' The teacher identified a mathematical term and one student gave the first word in the definition using his/her right hand to tap the hand of the student on his/her left. The next student added a word to the definition. Most of the definitions consisted of seven or less words. Upon completion of each definition, the teacher introduced a new term. The pace was rapid. When a word was mispronounced, the teacher asked students to self-repair. The activity flowed with ease. However, if one student could not recall the next word in a definition, other students helped. The teacher did not criticise anyone. At the end of this warm-up, the students applauded and returned to their seats.

The formation of a circle, the sharing of responsibility for defining terms, the tapping of another student's hand, the fact that students helped one another, the lack of criticism from the teacher or from students, the students' focus on the task at hand, and the joint applause all left the impression that both the activity and participants' behaviours were part of an appreciated routine demonstrating solidarity among participants and respect for the educational task at hand. It also signalled to students that there was no hiding in this classroom, with each student being expected to know what had been taught/what they should have learned, and to demonstrate their knowledge in front of others. Moreover, this activity gave the opportunity to each student to feel a certain measure of success at the start of the lesson. In addition, the minute of revision had the potential of fostering learner autonomy and learning skills development as it helped students to focus on the importance of using time efficiently and it provided immediate feedback on the results of their revision.

Students returned quickly to their desks. Within seconds of finishing the warm-up, the teacher pointed to four triangles on the board (sine alpha, sine beta, etc.) and told the students that she was going to dictate questions about the triangles that they were to write in their notebooks and then answer. The teacher-dictated questions included: 'What are F and R in the fourth triangle?' and 'In the third triangle, what are tangent, beta and alpha?' The teacher's Estonian-language questions were supported by the visual representation of the four triangles on the board. Students seemed totally engaged silently writing down the questions and then answering them. Prior to most students answering all four of the dictated questions, four students were sent to the board and asked to each write out their answers. One of the four students at the board began copying answers from someone else's notebook and was told in a neutral tone to get his own notebook and do his own work. The teacher left the impression that she expected all students to think for themselves and to be successful.

In taking up the work on the board the teacher asked several questions of one student to analyse a triangle and the process used to get the answer to her dictated question.⁷¹

Teacher: Is the answer on the board right or wrong?

Student: Don't know.

⁷¹ All translations of Estonian-language discourse seek to include the grammatical accuracies and inaccuracies of the original spoken text. For the purposes of this thesis the term translation, which refers to the rendering of meaning in written form from one language to another, is conflated with the term interpretation meaning the oral rendering of the spoken word from one language to another.

Teacher: What did you not like about the second triangle?

Student: It is difficult to answer.

Teacher: What made it difficult to answer?

Student: Can't figure out the length of either of these sides.

Teacher: Yes, what about the third side?

Student: Five.

In this case the teacher broke the typical 'Initiation-Response-Feedback' cycle (Sinclair and Coulthard, 1975: 21) using a more 'dialogic' form of instruction (Alexander, 2010: 306). Moreover, the student was required to explain the difficulties he faced. The teacher continued: 'Those that did not answer number two did the right thing. There was not enough information to answer this question.' In the above example, critical thinking was fostered by a problem that could not be solved. Instead of immediately saying an answer was correct or incorrect, the teacher focused on students' thinking processes and their use of formulas by asking questions such as: 'Which formula did you use? Did someone solve this problem in a different way?' This requirement to analyse and explain meant that dialogic exchanges, of which several were longer than the one quoted above, were the rule not the exception during this lesson. This dialogic approach meant that no student was able to simply say he or she did not know the answer, but was instead engaged in a discussion with the teacher that involved a series of questions or clues leading to an answer. Many teacher questions required student answers that were more than one sentence in length.

In addition, student inaction met with an immediate response from the teacher. For example, later on during the lesson when students were doing individual work the teacher noticed one student staring into space. No mention was made of the student's behaviour, but instead the teacher approached the student and asked a series of questions regarding steps to be followed in solving the problem. This reinforced my view that this teacher was committed to supporting the learning of all of her students. Moreover, she did not simply support students in difficulty. During that same individual work assignment, she asked the class for a show of hands regarding who had finished the assignment. The one student who had completed his work was given an additional assignment. This teacher's commitment to maintaining the engagement of all students was constantly visible.

Time limits were set for most assignments undertaken during the lesson, and were adhered to strictly. Furthermore, these strict time limits were supported: with clear instructions that the teacher on one occasion had students reiterate before they started work; with assignments that were manageable in size being restricted to one-three-five problems; with individual attention being given to students in difficulty; with teacher-scaffolded rich student analysis of how problems were solved; and, with assessment of achievement at the end of each assignment. This reflects many of the scaffolding strategies suggested by researchers (Walqui, 2006; Gibbons, 2002). Moreover, high expectations, a hallmark of successful bilingual education (Baker, 2006: 316; Cloud *et al.*, 2000: 10, 12), seemed omnipresent with the teacher, for example, saying: 'You have seven minutes to solve one problem. Let's see if someone can solve more than one.'

At the same time, the atmosphere during the lesson was such that one student felt comfortable enough to challenge the teacher when an explanation was given about how to solve a problem that was counter to the way that student had solved it.

Student: Why can't I write that?

Teacher: Yes, you can also solve the problem that way.

Furthermore, another student felt comfortable enough to ask 'What does solve mean?' The question could have easily surprised a Grade nine teacher whose students were in their fourth year of studying many of their subjects through Estonian. The moment could have been used as an opportunity for sarcasm or humour. This teacher simply answered the question in a matter-of-fact manner. These two student questions demonstrated that the teacher had created a safe environment where students felt free to ask questions without fear of ridicule or criticism. Furthermore, later in the lesson when students were correcting each other's work on the board a student drew an X on top of another student's answer and wrote the correct answer above the X. The teacher told the student not to cross out anyone's work stating: 'Even if it is completely wrong, draw arrows and show where the thinking is faulty.' This represents a clearly stated expectation that when students notice an error, they are not to give negative feedback to their fellow students, but are instead expected to help explain where thinking has been misconceived. The teacher was fostering a culture of cooperation over competition. This is in line with research evidence showing that cooperative learning has a greater positive impact on student achievement than competitive learning, and that it builds student self-esteem (Johnson and Johnson, 2002: 103; Roseth *et al.*, 2008).

In addition, this teacher directed students on several occasions to assess their work or the work of others. For example, upon completion of an assignment the teacher explained the marking scheme. She then asked for a show of hands to see how many points students received. She did not offer praise or criticism for high or low marks. She focused her attention on those making an effort, which according to Dweck (2010: 28), particularly in the long-term, is more effective than praising intelligence. This type of assessment was made several times during the lesson and can be considered a way of scaffolding student thinking about their own learning and what they need to do to improve. This use of assessment reflected a classroom culture of self-reliance, where students supported one another. The teacher always sought answers from the students instead of demonstrating her own knowledge. For example, having heard a student give a wrong answer the teacher asked: 'Is that accurate?' The student responded with silence. The teacher persisted and asked the student to recalculate. The student worked out the correct answer and responded saying: 'It is 36 not 35'. Thus, although learning skills were not discussed they were being constantly modelled.

The teacher also asked students to explain how what they were learning in Mathematics could be used in everyday life. The teacher thereby sought to help students draw meaningful links between intended learnings and their lives. Moreover, meaning was enriched through the various opportunities offered for using mathematics – whole class discussion, individual work, pair work

and group work. As Mercer (2000: 171) points out, 'we continually try to relate what we hear to what else is going on and to any relevant past experience' and in successful communication a group effort is required to contextualise thoughts and give them meaning which is something that 'is negotiated and maintained by mutual effort.' Using all four language skills (speaking, reading, writing, listening) should also have deepened student understanding of the topic at hand. As students were encouraged to think critically and do cognitively challenging work, this would have helped to make learning more meaningful and increased the likelihood that new learning is retained (Baddeley, 2004: 161). It is also likely that this rich and meaningful use of content would have imbued the language with greater meaning and thereby supported language learning.

Several other content and language teachers were observed fostering student engagement in cognitively challenging tasks and doing so in a manner that helped students to feel sufficiently safe to experiment with both content and language. This challenging content helped students to learn both language and content. For example, an Estonian-language teacher was observed teaching a Grade eight Language Arts class of nine students. Language Arts classes (e.g. English, German, Estonian, Russian) are normally split in two in all schools in Estonia and for all languages except for the students' L1 in order to support greater student participation. This class was discussing styles of music. Rich scaffolding was provided through mindmaps and the brainstorming of language to activate students' existing knowledge of language and ideas related to music. Students were given an assignment when listening to others. During peer cooperative work the teacher moved from group to group answering questions and providing them with the vocabulary and discourse patterns for saying things they wished to say, but did not know how to express. During whole-class discussion several seconds of thinking time was given, encouraging more students to raise their hands. No criticism was made of students' answers, but they were asked to explain their reasoning. Time limits were set and respected. Students were given some degree of choice over activities, which suggests an act of power-sharing that fosters autonomous learning (Stevens, 1983). Although allowing students to use their L1 for group work, all the students were expected to use the L2 in whole-class activities. The teacher set high standards, for example, by having students adjust to a formal register of speech when speaking to me. Several tasks required higher-order thinking. Similar examples of teachers fostering a sense of psychological safety, using cognitively challenging tasks whilst providing scaffolding were to be found in other Estonian Language Arts, Mathematics, Music, Geography, Biology and Civics lessons. Students in all of these classes appeared engaged in learning with little evidence of any off-task behaviour.

Teachers supporting language learning

All the teachers during the 11 observed language lessons supported language learning through using strategies such as recasting (teacher mirroring back a corrected version of a student's incorrect utterance), having students translate from Estonian to Russian or vice versa, deconstructing words and/or directing students to vocabulary in textbooks. In 16 of the 26 observed content lessons

taught entirely or in part through Estonian, teachers were observed using strategies to support language learning. For example, one teacher used Russian in a particularly judicious and strategic manner – once to maintain pacing during a lesson where several attempts to explain the meaning of a word using Estonian had failed, and on another occasion to help a student doing board work who appeared to be unable to move forward. This classroom culture was focused on functioning in the L2, but provided the opportunity for brief and targeted L1 use when it was needed to maintain the momentum of content learning. This is what Martin (2003) and García (2009) describe as a more modern view of bilingual education where the strategic use of the L1 in L2 content classes is accepted, yet not overused.

In addition to the above highly effective use of the students' L1, seven content teachers used translation from Estonian into Russian to verify comprehension. Language learning in the Estonian-language content classes for Russian-speaking pupils was supported in other ways as well. Two content teachers used recasting, and one explicit correction. In two lessons, content teachers deconstructed words and provided linguistic prompts. For example:

Student: What does 'piirneb' (to border) mean?

Teacher: What does 'piir' mean?

Student: Border.

Teacher: So what does 'piirneb' mean?

Student: To border.

In Estonian, the third person singular of the verb to border (*piirneb*) ending in the letters 'neb' is sufficiently different from the noun border (*piir*), which is a word known to students for it to be initially incomprehensible to the student in question. In this example, the student is being encouraged to think critically and to find the meaning of 'piirneb' for himself. The teacher provided a scaffold by asking what the root of the word means. The student answered that it means 'border'. By then asking the meaning of 'piirneb' the teacher provided a sufficient scaffold so that the student was able to answer his own initial question. By supporting a student in deconstructing a word to unlock its meaning, this content teacher also modelled a strategy that the student could possibly use autonomously in the future to unlock the meaning of both content and language. Knouzi *et al.* (2010) and Edmondson (2009) stress the importance of language learners being able to self-scaffold their own learning.

Use of translation

Translation was used in nine content lessons and often regularly throughout each of the lessons either to translate terms or sentences from Estonian to Russian or vice versa. The intent of this translation was to check for comprehension of language and/or content. Sparing use of translation to check for comprehension by having students translate from their L2 to their L1 or occasionally translating terms for students when they are unable to understand L2 explanations is considered

judicious. Several examples of judicious uses of translations were observed. However, less than judicious uses of translation were more commonly observed. Translation from Estonian to Russian was used in seven of the observed lessons on a regular basis, as opposed to selectively in cases where there was a concern about comprehension that could not be checked through L2 use. For example, in a Grade eight Physical Education class, a teacher regularly translated Estonian-language instructions into Russian despite the fact that most students acted on the Estonian-language instructions prior to hearing the translation. It is unlikely that students would not have understood Estonian-language instructions such as 'Form teams of three'. The most complicated language used during that Physical Education lesson was an explanation of how points are scored during a volleyball game and how players are rotated.

The team that gets 10 points are the winners. Each time a point is scored, one person goes off the court and is replaced by someone on the bench.

Students in their third year of studying several subjects through their L2 would, generally speaking, understand this language. This calls into question the utility of the translation. Moreover, the teacher was not assessing whether students understood Estonian-language instructions by having them do the translation. Rather, the teacher continued to do the translation himself. As the teacher had on one occasion asked the students to translate some Estonian-language terms into Russian, he was aware of this strategy. This teacher also used English to deliver one set of instructions which he did not translate: 'Who is next? Is it your turn? OK, go!' The student responded appropriately.

Prior to the lesson, this Russian-speaking teacher, who spoke Estonian with native-like fluency at least within the registers of speech that he used in speaking with me, said that he did not believe in teaching only through Estonian. He argued that when it came to safety, for example, Russian needed to be used to ensure comprehension. However, I did not see any safety issues being addressed during the lesson. The teacher also explained that he had been fortunate enough to grow up bilingual, living in a neighbourhood where he constantly used both languages. He expressed a belief in a bilingual ethos. This may have influenced him in extensively using both Estonian and Russian during lessons. Although speaking Estonian in class, which implies that he sees this as a beneficial teaching strategy, he was not seen to be encouraging students to speak the language. Students answering the teacher did so almost entirely in Russian. The teacher may be unaware of either the need for students to use the L2 more actively or know how to scaffold language use. This teacher appears to have seen his primary responsibility to be that of a content teacher. He did not appear to have fully understood his role as a language teacher. Teacher talk dominated the lesson. Moreover, his understanding of student engagement appeared to be mostly tied to students being physically active, as opposed to also using the L2 and being encouraged to think critically. These teacher behaviours can be seen as reflecting low expectations of students' capabilities.

By contrast, in another school I observed a Grade nine Physical Education lesson taught entirely though Estonian. I had previously observed this teacher after the start of the programme in

2004. At that time, she taught strictly through Estonian by using a series of commands without ever entering into dialogue with her students. In 2004, she was unable or unwilling to have a conversation with me in Estonian and she communicated through Russian via an interpreter. Prior to the lesson I observed for this study, the teacher spoke to me in Estonian saying that she was studying at the local college in Estonian with the aim of qualifying as a high school Civics teacher. She said she wanted to improve her Estonian so she could teach through Estonian. She had achieved a remarkable level of fluency. She made no errors in speaking with me and none in speaking with her students.

Teacher: Don't move too quickly.

Teacher: Left-handed dribble. If we stop with the ball, what do we have to do?

Student: You throw ball.

Teacher: Now dribble moving backwards diagonally.

Teacher: Now dribble skipping. Now skipping and dribbling with your left hand.

Dribbling while hopping on your right leg. Now sideways. If we are moving sideways with the left side forward, which hand do we dribble with?

Student: Left.

Teacher: No, you use the opposite hand.

This teacher expected her students to operate entirely in Estonian and they did so. Although they did not speak a great deal, they followed Estonian-language instructions accurately and when questioned answered in Estonian. Moreover, this school is located in a predominately Russian-speaking city where students are unlikely to find themselves needing to use Estonian outside of school. The lesson, taught entirely through Estonian, is an example of a teacher having high expectations for herself and her students. Although an opportunity was missed to encourage greater dialogue and critical thinking⁷² by, for example, asking students to explain why one dribbles with the right hand when moving left side forward, and by providing language scaffolds, the teacher, nonetheless, had made remarkable progress over the years, and clearly saw her role as both language teacher and content teacher. As rich language and content scaffolding and the fostering of critical thinking (Coyle *et al.*, 2010) are central to effective bilingual education, additional professional development opportunities and mechanisms are likely to be needed to support this teacher and her above-mentioned physical education colleague.

A Grade seven Mathematics lesson taught primarily through Russian provides another illustration of the non-strategic use of translation and of how teacher beliefs can act as a barrier to L2 use. For example, this teacher read out a question in Estonian. Six of the 20 students present immediately raised their hands to answer the question whilst the teacher translated it into Russian. She continued to translate the remaining questions as well, without first determining whether students

⁷² Of the observed 37 lessons taught through Estonian or through Russian and Estonian, 27 included some questions that moved beyond the factual level and encouraged critical thinking. In more than half of these 27 lessons, there was considerable room for increasing the cognitive engagement of students: rare were follow-up questions directed at one student, requests for students to explain their reasoning, or the provision of frameworks for analysis.

understood the Estonian-language questions or not. Students started to shout out answers before the teacher completed her translation. Extensive translation of classroom discourse has a tendency to eliminate the need for learning the L2, as key information can be obtained through the L1. It denies students in part the opportunity to be simultaneously cognitively challenged by both language and content. As extensive unnecessary translation takes time, it is wasteful and it may also lead to a slower processing of information and be adding an unnecessary step to the learning process. As with the first Physical Education lesson described above, developing an understanding of Estonian was the unstated but intended language-learning outcome for the lesson. However, an opportunity was missed to support students in developing their capacity to speak and reason using the L2.

At the end of the lesson, the Mathematics teacher said to me in Estonian: 'This is the start of the topic. It is a difficult topic. That is why I do it in Russian'. These few sentences left the impression that she spoke Estonian fluently. Her statements reveal an understanding that challenging content cannot be taught through the L2. This teacher's belief that difficult content needs to be taught through the L1 may be informed by her teaching style. Although individual and board work took place, teacher talk dominated her lesson. Students were not given thinking time before answering. On four occasions the teacher named the student who was to answer a question before she asked it. As soon as the student was named noise levels rose as other students appeared to lose the motivation to participate and refocused on their social world by speaking amongst themselves. Students answered questions in Russian often using only a word or two. Dialogic discourse was not encouraged to surface student reasoning or learning strategies. Noise levels continued to rise throughout the lesson leaving the impression that students were under-engaged and under-challenged. No discussion of the learning process or what was achieved during the lesson took place. It may be the lack of teaching skill and strategies for how to foster greater student engagement and how to scaffold content learning in an L2 context that is at the root of this teacher's belief about the need to teach 'difficult' content through Russian. Moreover, by teaching difficult concepts, first through Russian, students are denied the opportunity to do cognitively challenging work in Estonian. If content teachers do not create intellectually challenging environments for both content and language learning, they are likely to minimise learning opportunities for their students (Cummins, 2007: 126). Cognitively challenging work is more likely to be meaningful and recalled, than unchallenging work (Baddeley, 2004: 161). Based on the above examples, it appears that L2 use is strongly tied to teacher beliefs, personal goals and know-how or lack thereof.

Teachers choosing not to teach classes through Estonian

Other teachers were also observed choosing not to teach through the medium of Estonian despite having the fluency to do so, and despite the fact that their schools were not teaching the agreed upon percentage of classes through Estonian. In a Grade nine Civics lesson, a teacher who spoke Estonian well chose to teach through Russian. Prior to the lesson she said she would teach in

Russian. I asked her whether she ever taught this class through Estonian. She answered 'no'. I waited trying not to react. After a short pause, the teacher told me that it is hard to get these youngsters to come to school. She also stated that the school is in an area with many social problems. No mention was made of ways in which the school was seeking to support these students.

Much of this Civics lesson was spent doing a test during which I recorded five incidents of cheating involving eight of the 24 students present. For the purposes of this thesis, cheating on a test is taken to mean the breaking of overtly or tacitly agreed upon rules. In this case, students were required to spread out throughout the room prior to the start of the test implying that they were not to copy off or speak to one another. Cheating consisted of students discretely copying one another's answers or whispering to each other while covering their mouths or faces. All the incidents went unchallenged. The test papers were collected and handed to the teacher. The teacher then asked the students the test's questions orally. Students answered the questions one at a time whilst off-topic student-to-student discussion steadily increased. The teacher steadily raised her voice until the end of the lesson, at which point she seemed strained and drained. This teacher appears to have low expectations for her students as they were allowed to cheat⁷³, they were not being given the opportunity to learn through their L2, and the classroom activities did not fully challenge and engage students. Her initial unsolicited comments made to me about truancy and the neighbourhood having many social problems also support this conclusion.

Other teachers were also choosing not to teach in Estonian. For example, I observed a Grade nine Chemistry lesson with 24 students. The teacher told me before class that she teaches mostly through Russian. She said she teaches Estonian-language terminology and does some simpler tasks or exercises in Estonian. The students used both an Estonian and a Russian-language textbook. The student exercise book was in Estonian. During the lesson, the teacher asked students to translate from Estonian to Russian. For example, as they corrected an exercise she had marked in the students' workbooks and which she said had been done poorly, each student answering, first read out the Estonian-language question and then translated it into Russian and then gave the answer. The reason for the poorly done homework was not necessarily tied to language issues. Problems may instead have been related to not understanding content concepts. Moreover, being able to translate a question from one language to another does not mean that a student has understood the question or knows how to solve it. Estonian-language explanations or dialogic discourse in Estonian or in Russian were not used to explore the problems. However, the teacher did encourage self and peer-repair of content and language errors. She also recast mispronounced words with the correct pronunciation.

⁷³ Extensive cheating was observed on tests taken in three other lessons taught by other teachers (two taught through Russian and one through Estonian). Cheating consisted of students looking at each other's test papers, the exchanging of non-verbal signals and whispering. Allowing cheating can be seen as a form of low expectations where students are not being held to a high standard. Although successful cheating can be interpreted as an act by which students are exercising their power in the short-term over the education system, allowing cheating is likely contributing to an impoverished learning environment.

Furthermore, this teacher told me that she would have preferred to have an extra lesson per week with these children, because they do so much translation in class. She said it takes five minutes to do this same assignment in Russian with her mainstream Russian-language group whereas it takes 30 minutes with the immersion students. In fact, the assignment took these students 20 minutes. It is also noteworthy that this teacher arrived late for the lesson. In addition, she collected work from seated students one at a time, as opposed to having them pass up their work whilst directing students to the next activity. The teacher appeared to have an inaccurate understanding of how she used time. A belief in the value of translation, and a lack of strategies for supporting language and content learning appear to be acting as obstacles to the greater use of the L2 as a medium of instruction.

In addition, a Science teacher who is held in high esteem by my Immersion Centre colleagues, and whom I had observed in 2004 successfully teaching Grade six Science through Estonian, chose to teach the Grade seven Science lesson I observed (for this study) through Russian. The teacher speaks Estonian well and the school had agreed with the Immersion Centre to teach this subject through Estonian. Moreover, I was aware that this teacher had had access to at least 80 hours of training in teaching through an L2. The 19 students in her class were engaged in learning throughout this lesson, although it was teacher-driven and did not involve peer cooperative work. She did have students translate some Russian terms into Estonian, used recasting to correct Estonian pronunciation and used some Estonian-language materials indicating some level of commitment to L2 learning.

After class, the teacher said she could not teach Grade seven Science in Estonian as the concepts were too difficult. She explained: 'In Grade six they learned about nature – lakes, rivers, etc. This is easy to teach through visuals.' She gave me the Grade seven Estonian-language Science textbook, which is full of dense text, as evidence of why it cannot be used. She said she dictates notes to students in Estonian, and gives all the learning material to the students herself. I asked about the worksheets created by the Immersion Centre that seek to scaffold both content and language. She said that they do not match up with the textbook they are using, but that she does use them.⁷⁴ (They are aligned with the national curriculum.) It appears that this teacher lacks strategies for teaching Science concepts through the L2 that are not easily represented through visual materials. In addition, this teacher mentioned a recent promotion and being short of time. She ate her lunch during a ten-minute break between two classes. As is often the case with content teachers (Gajo, 2007: 578; Genesee 2008: 34), this teacher's commitment is first and foremost to her subject.⁷⁵ The agreement to teach through Estonian is of secondary importance to her. This implies a distancing of herself from the Immersion Centre and the broader immersion community.

⁷⁴ In contrast, a Grade eight Biology teacher (not the one mentioned above) reported using some of the Immersion Centre's work sheets in her Russian-language Biology classes because they 'are so clear and well done'.

⁷⁵ I also observed this teacher teach two Mathematics lessons to immersion students virtually entirely through Russian. During one of these lessons a student asked a question in Estonian. This can be seen as an attempt to shift the classroom discourse to the L2. The teacher answered in Russian. No further student attempts to initiate L2 discourse were observed.

Teachers teaching through Estonian without requisite training

A history teacher, who is a native speaker of Estonian, and who suggested that she had received almost no training in immersion, demonstrated considerable potential for fostering student learning. In a Grade eight lesson, she worked with her students to create a mindmap about World War I with the following reference points: 'causes, triggers, war plans, participants, allies'. In a Grade nine lesson, she co-constructed a graphic organiser with her students to draw out how key players contributed to the decline of the Soviet Union, and she had students fill in a chart comparing three different periods in Soviet history. In a Grade seven lesson, she asked students to create a paper memory quilt to draw out salient facts about health and hygiene during the Middle Ages. In addition, she asked several thought-provoking questions that made links between her students' lives and history, such as: 'Would you have volunteered to fight in World War I, and why or why not?' She provided scaffolding by giving students an opportunity to first discuss that question in groups before encouraging whole class discussion.

However teaching through the students' L2 presented a considerable challenge to this teacher. For example, in a Grade seven History class, this teacher told her 11 students at the start of the lesson that they were to create a memory quilt out of paper. Each student was asked to create seven squares. Students were asked to draw out key points from a four-page text that they had read about hygiene, diseases and medicine in the Middle Ages, and write one salient point in each of the seven squares. Students were also asked to illustrate each square. The four-page text was very dense. It was intended for native speakers. It contained several low frequency words and constructions. The paragraphs were quite long. The text had two major illustrations. It did not include any other scaffolding of language or content through, for example, the provision of synonyms, the highlighting of key messages or the inclusion of subheadings or diagrams.

While the students worked on the assignment, the teacher explained to me that during the previous lesson she had read the four-page text to the students so that they would hear the correct pronunciation. It is unlikely that the students would have on first hearing understood the text, making it difficult for the students to concentrate on it for the entire reading or to later emulate the teacher's pronunciation. The teacher told me that she had students one at a time read, as a whole-class activity, through the text and that they simultaneously worked through the vocabulary. She stated that she corrected pronunciation and asked students to do the same. This focus on form is an example of giving students listening to a text an assignment. However, it is possible that student engagement was low, as I saw very few examples of student writing on the photocopies, which may have been an indication of their lack of engagement with the text. In order to increase student engagement during listening exercises, researchers and practitioners suggest, among other things, giving students assignments such as recording any words or ideas that they hear, and then working in small groups to reconstruct as much of the read-out text as possible (Cloud *et al.*, 2009; Gibbons, 2002).

Thirty-six minutes into the lesson, I could see that seven out of the 11 students in the class had not written anything on the squares. They were illustrating the squares. The remaining four students were busy writing sentences into the squares. They appeared to be copying those sentences straight from the text. The teacher had spent most of the first 36 minutes of the lesson walking about the classroom. She did not stop to assist any students. Forty minutes into the class, the teacher asked three boys how many squares they had finished. They answered four or five. Their response was accepted by the teacher despite the fact that they had not written anything into their squares. The teacher did not encourage any of the seven students who had not begun to write in their squares to do so. The teacher did encourage students to be quiet on occasion, but did not seek absolute silence which left students the option of helping each other in doing the assignment. The only other direct verbal feedback to a student came in the closing minutes of the class, when the teacher told one student who had written copious amounts into each square not to write so much. The students in this class appeared to have developed a coping mechanism for how to avoid doing substantive work, by busying themselves with that part of the assignment which required the least amount of cognitive effort. During this lesson, the teacher was prepared to allow the students to do this. This could be described as a power stand-off where both sides – the teacher and the students – retain a certain amount of autonomy, but do not use this autonomy for fostering student learning.

Despite the fact that the students were not engaged in the assigned task in a substantive manner, the teacher choose not to reassess her plans and provide additional scaffolding by, for example, asking students what help they needed, by displaying a sample salient point on the board, by breaking the assignment down into more manageable steps, or by working through the first paragraph with the whole class to find the salient point and to summarise it in writing. An opportunity was lost to increase student engagement through ‘engaged reading’ strategies which help students overcome disadvantages of ‘gender, parental education and income’ (Guthrie, 2004: 5) or through peer cooperative tasks. The language required for undertaking peer cooperative work and for discussing the content concepts – ‘the language for learning’ (Coyle *et al.*, 2010: 37) – was not provided.

This teacher told me that the students’ language teachers had not sufficiently prepared the students to learn through Estonian. Thus, she saw herself first and foremost as a content teacher, and articulated a belief that these students were not able, with their current level of Estonian, to navigate and learn challenging content concepts in their L2. The teacher also blamed the Immersion Centre. She told me that the Immersion Centre worksheets, although good, were from a language perspective too difficult. However, she did not add any scaffolding to the worksheets. The teacher also blamed the students’ parents and the students, arguing that there were certain historical facts she could not teach as they would be rejected. Exceptionally this teacher often used students’ family names in addressing them, and she was not observed saying any personal ‘hellos’ or ‘good-byes’. Opportunities for meaningful dialogue were missed. For example, a Grade nine student saying he would volunteer to fight in a war because ‘I love to kill others’ was met with silence and no discussion. In addition, the teacher told me that of the 16 students in her Grade nine History class ‘only six planned to continue in school after Grade nine’.

Despite having considerable knowledge about how to structure an effective lesson, and how to ask thoughtful questions that helped connect historical topics to students' lives, this teacher seemed to dissociate herself from her students, and even from the materials she used, blaming others for the situation she found herself in. A sense of teacher-student 'affiliation' as evidenced by the co-construction of shared membership in a valued group working toward common goals appeared to be lacking (Pennington under publication). Further, this teacher was misinterpreting the students' lack of language knowledge and their seeming lack of interest in school as insurmountable barriers to learning through Estonian. This teacher's sense of affiliation to her students and their school may have been undermined by the fact that she taught full-time at the local Estonian-language school. The influences on this teacher appear to be manifold. However, this potentially skilful teacher appears to have been overwhelmed by her lack of knowledge regarding teaching through an L2 to the point where she was not able to scaffold her own learning or was not able or willing to seek assistance from others. In all three observed lessons taught by this teacher, the learning environments can be considered impoverished and the students' behaviour mirrored the teacher's expressed opinion that they were 'weak' students. Hattie (2009: 124) argues that student achievement improves significantly when teachers avoid labelling them. It is noteworthy that in Mathematics or Physics lessons where teachers avoided labelling these same students I observed them highly engaged in learning, successfully solving problems and dialoguing with their teachers with the most minor exceptions entirely through Estonian.

I observed another native speaker of Estonian, who had not received training in immersion, teaching a Grade nine Art class entirely through Estonian. The teacher told me before class that the students do not listen. At the start of the class the teacher greeted his students and asked me to introduce myself. Most of the 24 students present were involved in conversations. I stood in front of the class, smiled and did not speak. The students quietened down quickly and listened to me. I explained who I was and why I was in the class. The students exchanged some short comments with me in Estonian and English.

As I sat down the students began to speak amongst themselves. The teacher said: 'Let's think about a letter of commendation that you would like to receive.' At the same time, nearly all the members of the class were engaged in student-student conversations. The teacher showed and passed around a few examples of illustrated letters of commendation. The students were first asked to think about a letter of commendation that they would like to receive, and then to write and illustrate one. The teacher drew an example on the board. It consisted of:

- a) the name of the school;
- b) the words 'letter of commendation'; and,
- c) the school logo.

No further instructions or performance criteria were provided. Students worked at the task, but directed considerable energy into conversations. The teacher started to chat with me. He explained that these students come from disadvantaged backgrounds and that they cannot speak much Estonian. I said that I did not wish to keep him from his class; however, despite repeatedly giving

the teacher this signal, he did not redirect his attention to his students. Close to the end of the lesson the teacher collected the letters of commendation and showed some of them to the class. Several students said ‘very pretty’ in Estonian several times – a response that left the impression more of mocking than of serious assessment. No other teacher-guided assessment took place. The bell rang and the students stood up and left. One young man told me on exiting that this is an excellent class. I asked why. He answered that the teacher was ‘cool’.

Based on the lack of teacher-student dialogue and the teacher’s repeated references to the students’ socio-economic background and lack of language knowledge, and taking into account the teacher’s low expectations⁷⁶ for his students as evidenced by the cognitively unchallenging task they were assigned, it is likely that this teacher was mistakenly using his students’ background and behaviour as evidence of their inability to learn through Estonian. As was the case with the History teacher, this teacher was employed full-time in an Estonian-language school, which may have contributed to a further sense of dissociation from these students. Thus, a misinterpretation of the students’ ability to learn challenging content through Estonian, coupled with a lack of training in how to teach through an L2, proved to be overwhelming obstacles, contributing to a poorly conceived and executed lesson. In addition, it can be assumed that these students were exercising their power over the teacher to ensure that they had maximum time for socialising during the lesson. This correlates with 81.8% of students at this school and with the 74.8% of students in the total population reporting that the extent to which they are able to speak with friends during lessons is a criterion for judging the quality of a class.

Intended language and content outcomes

Marzano (1998: 127) and Hattie (2009: 246) both argue that setting clear instructional goals for students, and providing feedback on how students are progressing towards these have a powerful effect on student learning, as well as on improving cognition and student achievement. Wood *et al.* (1987) found that challenging goals significantly increased learning. In addition, outcomes or goals are a central factor in building language learner motivation (MacIntyre, 2002). Black *et al.* (2004: 14) argue that for students to be able to achieve a learning goal, they need first to know and understand that goal. This requires articulating and discussing learning goals and progress made in achieving the goals.

Through the questionnaire, the majority of teachers teaching through the students’ L2 reported setting content goals or outcomes more than twice a week: 42.3% every day; and 42.3% often (more than twice a week). Teachers indicated setting language goals or outcomes as

⁷⁶ In total, prior to, during or following nine of the 51 lessons observed in Maple, Ash and Birch gymnasias, teachers told me without being asked that their students were weak or that they came from socially disadvantaged backgrounds. In all nine of these lessons, there were serious problems with students staying on task. Time was inefficiently used. Students often spoke with each other about topics unrelated to the lesson and there was little evidence of learning.

follows: 11.5% every day; 50% often (more than twice a week); and 34.6% as sometimes (less than twice a week). Teachers also indicated sharing or discussing goals or outcomes with students as follows: 15.4% everyday; 50% often; and 30.8% sometimes. Further, 20% of teachers reported analysing the learning process every day and 48% frequently.

Thus, teachers indicated setting goals or outcomes far more frequently than they indicated sharing or discussing these with students. This implies that teachers could do much more to work with students to analyse learning goals/outcomes, progress in achieving these, and the learning process. Further, during the 37 lessons I observed taught through Estonian or through Russian and Estonian, goals were declared in five lessons. No intended learning outcomes were articulated. None of the teachers stated both language and content goals (cf. Figure 11.2).

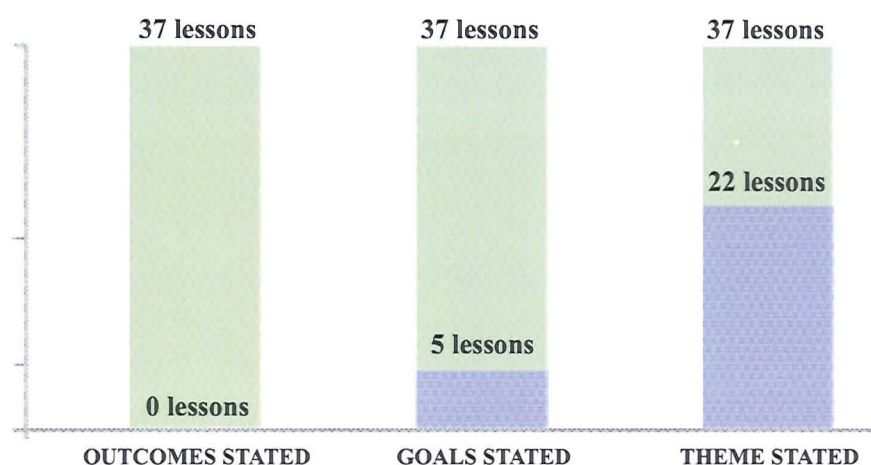


Figure 11.2. *Articulation of outcomes, goals and themes during observed lessons*

This implies that the dual focus on content and language, which is the essence of bilingual education, is not being applied in a systematic manner by teachers. At the very least, students in the observed lessons were not being made explicitly aware of what is expected of them both with reference to content and language learning. Consequently, students are less likely to maintain a consistent, dual focus on language and content. Even in cases where goals were declared, greater precision in articulating them could have been brought to bear. As a case in point, in a Grade eight Science class the goals were written on the blackboard in Estonian as follows:

Insects – who are they and what are they like?

1. internal and external features
2. comparing insects with spiders

Although one can surmise the goals of the lesson from the above example, the wording is not typical of outcome statements. Greater precision in using the language of planned learning outcomes could bring greater clarity to these statements. For example:

You will be able (verbally and in writing):

1. to list at least 5 defining characteristics of insects;
2. to describe their internal and external features;
3. to explain similarities and differences between insects and spiders; and,
4. to accurately use the comparative.

Such an exercise in precision can potentially provide the teacher with a framework for thinking more critically about planned learning outcomes and activities. Greater precision in outcomes could help students better understand what is expected of them. It can also provide the students and the teacher with a clearer basis for assessing learning and the learning process. The articulation of learning outcomes that pertain both to language and content has the potential of supporting students in maintaining a dual focus on both language and content.

In 22 of the above 37 cases, the theme of the lesson was stated, for example, 'Today we are studying Europe's location, borders and size'. This particular theme statement also gives a strong indication of what the student would need to learn. However, most theme statements were more vague, e.g. 'Today's theme is variations and rondo music.' A somewhat similar tendency was observed in lessons taught through Russian and English. In those 14 lessons, the theme was stated in seven lessons, for example, 'We are learning about Tolstoy today.' It appears that no goals or outcomes were stated during any of these lessons. My limited proficiency in Russian is a mitigating factor. Both classes taught through Estonian and Russian appeared driven by the content required by the national curriculum. Yet, stating the theme of a lesson is not as likely to foster student involvement or create a framework for discussing and thinking critically about progress in learning what is prescribed by the national curriculum, as would be the case if teachers were to state and discuss intended content and language learning outcomes.

This data from lesson observations and the teacher questionnaire seems to indicate that teachers may not fully understand the distinction between the terms: theme, goal, and learning outcome. It is probable that many teachers are not in the habit of setting measurable learning goals or outcomes. They may be confusing the terms. As for language learning, since content teachers were not observed stating language goals or outcomes, it is probable that they are simply assuming that the language goal for their students is to learn the new vocabulary and grammatical structures related to new content. However, a goal of this nature is too vague to provide sufficient direction to students, or to teachers in systematically planning for, assessing and supporting language learning.

No learning skills goals or outcomes were shared with students. Learning skills received only cursory attention in a few classes. Learning skills development is one way of helping students to think critically about their education, and to assume greater responsibility for their learning: they play a critical role in solving cognitively challenging problems (Veenman *et al.*, 2002: 337). This potential is being under-exploited.

Group work

A further discrepancy between teacher-reported use of teaching/learning strategies and their actual use was found in two schools. Although there is often some level of difference between what educators say and do (Freire, 1993: 121), in two schools the difference between reported and observed-use was marked. Teachers were asked how frequently they used group work. Teachers from Maple Gymnasium reported using group work as follow: 33.3% often, and 66.7% sometimes. At Ash Gymnasium those figures were: 14.3% every day, 42.9% often, and 42.9% sometimes. Teachers from Oak Gymnasium reported using group work as follows: 25% every day, 37.5% often, and 37.5% sometimes. At Birch Gymnasium those figures were: 20% every day, 40% often, and 40% sometimes. There is a particularly wide gulf between teacher-reported perceptions regarding their use of group work and what was noted during observations of lessons taught through Estonian or Estonian and Russian in Maple (1 observed case) and Oak (0 observed cases) gymnasias (cf. Figure 11.3).

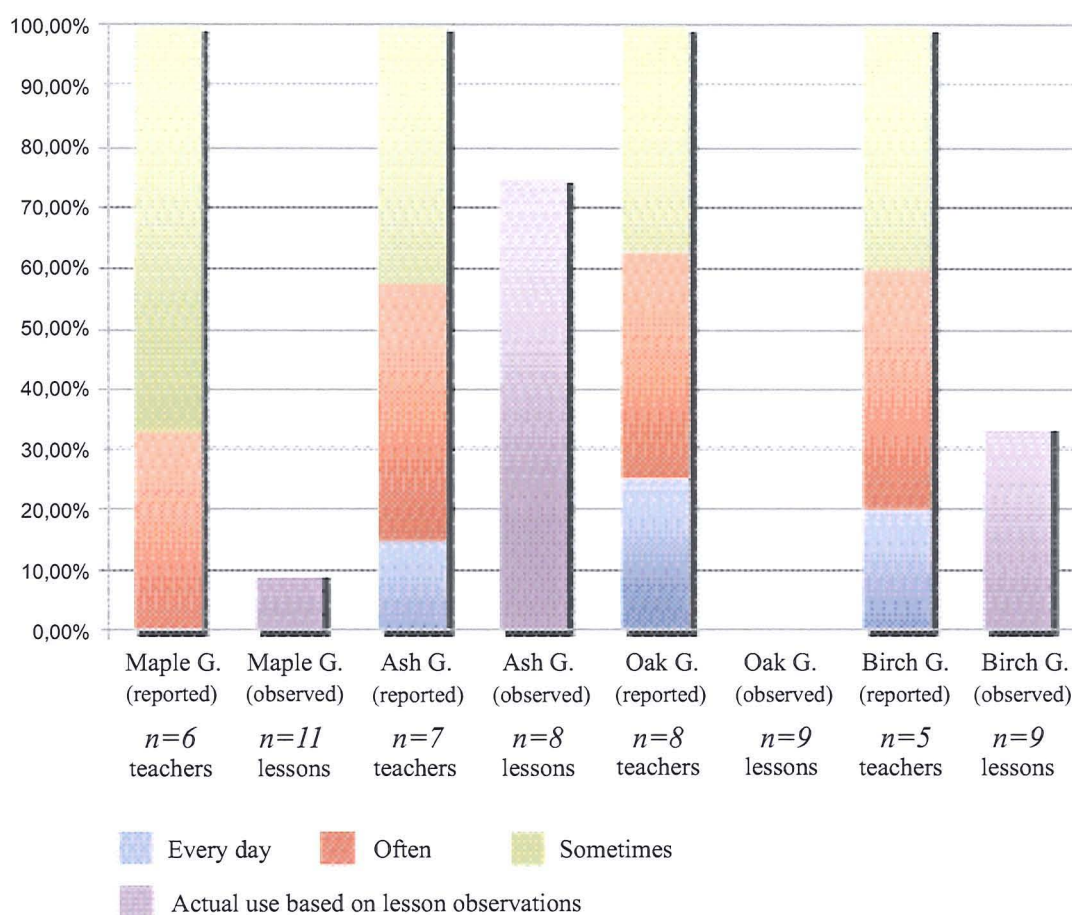


Figure 11.3. Percentage of teachers reporting use of group work vs. observed use

Also, there is ample room to increase the effectiveness of group work. For example, I did not observe any students listening to group presentations engaged in a related assignment, nor did I

observe students being provided with criteria for assessing group work, nor were group dynamics analysed during or after the group work activities.

When presenting the findings from this study about the observed use of group work and other teaching/learning strategies, two teachers at each school mentioned national examinations as impacting on their teaching. They argued that they were under pressure 'to cover the curriculum'. The need to press on was used as a justification for not doing group work or using other interactive strategies. It appears that these teachers' perceptions as to how they should prepare for national examinations may be impacting negatively on classroom practice. There appears to be a need to help these teachers understand how less frontal teaching and more innovative teaching methods could help students to improve achievement on national examinations.

Conclusion

Teacher beliefs appear to have a significant impact on classroom teaching/learning. Teachers who left the impression that they had high expectations for all students were observed creating rich learning environments. These environments were characterised by dialogic teaching/learning that encouraged students to think critically and to explain their thinking processes. These teachers used the L1 as the primary medium of instruction resorting to the L2 only briefly in order to facilitate continued learning through the L2. These environments were free of sarcasm or criticism, and students and teachers appeared to have a sense of affiliation towards each other.

However, in approximately half of the observed lessons taught through Estonian and in all of those taught through Russian and Estonian some form of low expectations was evident. These low expectations manifested themselves in statements about the socio-economic status of students and/or parents and about the difficulty of teaching demanding content through the L2. Low expectations were also reflected in the non-judicious use of translation, in the extensive use of the L1, and/or in allowing students to cheat in tests. These beliefs and actions led, in varying degrees, to the impoverishment of learning environments that lacked rich content and language scaffolding and/or where the use of the L2 was under-exploited. In addition, in some of these cases, students were not intellectually challenged and were not fully engaged in learning. Students from a low socio-economic status background were unlikely to challenge teachers whose lessons did not fully engage them in learning, nor were they likely to successfully challenge teachers choosing to teach through the L1, instead accepting L1 instruction and often using school time for their own social discourse. By contrast these same students were engaged in learning through the L2 in lessons where teachers expected all students to participate and actively engage with challenging content. This undermines claims about the impossibility of teaching students from low socio-economic status backgrounds cognitively challenging content through the L2.

As no teachers were observed articulating both content and language outcomes or goals, it appears that it is a particular challenge for teachers to assume the dual role of integrating both content and language. In addition, there was a disparity between teacher-reported and actually used teaching/learning strategies. This was the case not only with articulating and discussing learning outcomes, but with reported and observable use of group work. In addition, even experienced teachers, who have received considerable training in immersion, are likely to face newly emerging challenges over a period of several years. Furthermore, although requiring additional research, it appears that high-stakes examinations are having an impact on teaching practices. Some teachers reported that in order to 'cover the curriculum' they have increased frontal teaching, believing that this is more effective in helping students to achieve good scores on high-stakes examinations than, for example, well-structured group work. As several teachers expressed a need to have Immersion Centre-produced worksheets adapted to their situation, the Centre may wish to consider making its electronic materials available in formats that allow teachers to adapt these to their needs.

Finally, the 2003 agreement made between schools and the Immersion Centre regarding the number of subjects to be taught through the L2 was not being fully adhered to at three of the four schools studied. New opportunities to discuss this agreement and related issues with the Immersion Centre, teachers and school managers may help all of these stakeholders to better understand the challenges teachers are facing, and to renegotiate a new implementable agreement that is in the best interest of the students. This, combined with the lesson observation data from all four schools, suggests a need for frank, open and informed dialogue that includes discussions about teacher and other stakeholder beliefs regarding the teaching of challenging content through the L2 and the teaching of students from socio-economically deprived backgrounds. This also implies a need to discuss teaching and learning practices such as: the sharing of intended content, language and learning skills outcomes with students; the use of scaffolding to support outcomes achievement; and the analysis of outcomes achievement and the learning process with students. Perceived obstacles to the application of best practice (e.g. heavy workload and the need to prepare students for examinations) would also need to be discussed. The large number of interacting variables requiring discussion suggests that stakeholders may require support in analysing and otherwise processing their beliefs and practices. Additional professional development opportunities about how to build rich learning environments will likely be required.

The next chapter will explore the issue of immersion programme management.

CHAPTER TWELVE: PROGRAMME MANAGEMENT

Using data gathered from the student, parent and teacher questionnaires, and from interviews with school managers and decision-makers, this chapter explores stakeholder understandings that have implications for programme management and sustainability at both the systemic and institutional levels. Those themes which emerged from the richest data are explored. The chapter first explores measures of programme success including stakeholder satisfaction. Second it analyses stakeholder profiles and intentions. Third school ethos as reflected in interpersonal relationships and information sharing are discussed. Finally programme success factors from the perspective of teachers, school managers and decision-makers are analysed.

Success

The fact that the Estonian-language late immersion programme continues to operate in the four gymnasias where it was launched in the academic year 2003/04 and that in 2010/11 an additional 13 schools were offering the programme bear witness to its sustainability. This also implies some measure of success. In addition, student achievement on standardised Grade 12 national examinations provides some evidence of programme success. At the very least, it indicates that the immersion programme is not having a significant negative impact on student achievement. In 2010 the first cohort of immersion students graduated from Grade 12 at Maple, Ash and Birch gymnasias. In Oak Gymnasium, the first cohort graduated in 2011. Examination data are available from 2006-2010. In Estonia, students can choose the examinations they sit from amongst a wide number of subjects. Thus, the three best scores (three different subjects) of each graduate are being presented here. Based on the three combined best scores for each group of graduating students at Maple, Oak and Birch gymnasias, it can be deduced that studying through the L2 is not having a significant negative effect on student achievement (cf. Table 12.1).

Table 12.1. Three best scores of Grade 12 students on national exams from 2006-2010

	2006	2007	2008	2009	2010
Maple Gymnasium	64.0	62.0	57.2	55.5	60.9
Ash Gymnasium	59.9	59.5	53.0	56.8	71.1
Oak Gymnasium	77.9	78.1	74.6	74.3	76.3
Birch Gymnasium	63.3	65.8	71.2	65.9	63.6

Even though Maple Gymnasium and Birch Gymnasium have a large low-SES population it is noteworthy that no decline or no significant decline has occurred. Ash Gymnasium which has seen a significant improvement in student results has school managers who are both strong curriculum leaders and active learners, who encourage cross-curricular projects, create opportunities for students to meet Estonian speakers, and foster teacher autonomy and professional development. However, a number of caveats apply to the interpretation of this data-set. The number of hours of instruction students have received through the L2 at three of these four schools is unknown. In contrast, Birch Gymnasium is fully implementing the immersion programme as discussed in chapter 11. Ash and Birch gymnasia have designated their graduates as immersion students. The other two schools have not. All four schools are operating in a wider context of declining enrolment. Student attrition rates or reasons for leaving the programme are unknown, although one headteacher reports that several students leaving her school prior to graduation from Grade 12 are studying through their L2 at the National Police College. She presented this as evidence of the programme's success. Finally, the first cohort of any new programme may receive more attention than future cohorts, and as such may achieve higher examination scores than future cohorts.

Stakeholder satisfaction

From a management perspective it has been argued in this thesis that those managing immersion programmes be that at a systemic or an institutional level need to be aware of stakeholder perceptions regarding the programme, that these perceptions are likely to change over time and that support within and across stakeholder groups is unlikely to be monolithic. Stakeholder-reported satisfaction indexes can help draw out areas where programme support is tending toward being solid or being tenuous. The majority of the total population of parents, teachers and school managers reported being satisfied with the programme, whilst the majority of students reported liking the programme, both of which can be considered as indications of programme success. In addition, the overwhelming majority of politicians and government officials who were interviewed for this study also considered it to be a success. However, there are considerable variations in understanding within and across most stakeholder groups studied, which has implications for those managing programming.

Stakeholder satisfaction: students

On average across the four schools, the majority of students reported that studying through Estonian is either easy (18.8%) or that they can cope even though it is difficult (70.8%). This indicates that the majority of students believe they are successful at learning through the L2. This can also partially be interpreted as a measure of successful teaching through the L2. The 10.4% of students indicating that learning through Estonian was too difficult were unevenly

distributed between Oak Gymnasium (3% of respondents) and Birch Gymnasium (16.1% of respondents). Oak Gymnasium is located in a dominantly Russian-speaking city. The late immersion programme is optional at Oak Gymnasium, which may have contributed to low-performing students not choosing it. Moreover, Oak Gymnasium, as had been agreed with other late immersion schools, set a minimum C+ average in Estonian as a programme admission requirement, which can also be considered as a barrier to low-achieving students. Exceptionally, Birch Gymnasium located in a smaller, but bilingual community with only one Russian-language gymnasium and with only one class of students at each Grade level made the programme obligatory. This lack of choice at Birch Gymnasium may have contributed to some students having a negative attitude towards learning through the L2. The lack of programme entry requirements, the obligatory nature of the programme, and the lack of choice regarding community-based schools are significant influences on the achievement of a more diverse socio-economic and prior achievement level student profile at Birch Gymnasium. These factors may have contributed to the higher than average percentage of Birch Gymnasium students finding learning through the L2 too difficult. The linguistic profile of the communities does not appear to have an influence on student perceptions of the difficulty of learning through the L2.

Most students also indicated that they were making major (38%) or satisfactory (50%) progress in learning Estonian.⁷⁷ In addition, 63% of students specified that they liked or somewhat liked the programme. However, these figures varied among schools: 86% at Maple Gymnasium, 67% at Oak Gymnasium, 63% at Ash Gymnasium, and 22.5% at Birch Gymnasium. Thus, although a majority of students expressed liking the programme, in Birch Gymnasium, where the programme is obligatory, 77.5% of the students expressed some level of dislike of the programme, despite the fact that 84% reported being able to cope with studying through Estonian. Such a high level of dislike invites a management response. High levels of dislike may negatively influence students' attitude towards learning.

Stakeholder satisfaction: parents

Among parents, 62.6% of all respondents were satisfied with the late immersion programme. However, parental satisfaction across the four schools differed. At Maple Gymnasium, 71% of parents and at Birch Gymnasium, 56% of parents reported being dissatisfied with the programme. At Maple Gymnasium, there was no correlation between student dislike of the programme and parental dissatisfaction, as 86% of students reported that they liked the programme and 88% felt that they were coping with the demands it made on them. However, there is a correlation at Birch Gymnasium between parental and student beliefs, as 77.5% of students expressed dislike of the programme and 71% of parents were dissatisfied with it. Parental dissatisfaction at Birch Gymnasium may be related to the obligatory nature of the programme. Birch Gymnasium is the

⁷⁷ It is noteworthy that 45.8% of students reported not knowing what their Estonian language teacher thought of their progress in learning Estonian (51.2%, 23.1%, 71% and 42.4% at Maple, Ash, Oak and Birch gymnasias respectively).

only school in the sample offering 78% immersion in Grades seven and eight, and 60% immersion in Grade nine. It is also possible that the intensity of the programme may be a source of concern.

In contrast, at Maple Gymnasium the source of parental dissatisfaction may lie with the fact that the programme is not being fully implemented in accordance with the original commitment made to parents and students. I observed Biology, Chemistry, Civics, Geography, Mathematics and Science lessons at this school being taught primarily through Russian. However, uniquely at Maple Gymnasium, there is a positive correlation between low levels of parent satisfaction with programming in general and with their children's achievement. The majority of parents at Maple Gymnasium expressed dissatisfaction with student achievement in Science (75% of respondents), in History (69.2%), in Geography (69.2%), in Estonian (61.5%) and in English (53.8%). However, caution is called for in interpreting these figures as the sample is limited to 12-13 respondents. It is possible that a larger number of dissatisfied than satisfied parents completed the questionnaire. It is noteworthy that these parents were not uniformly negative in their responses as 84.6% expressed satisfaction with student achievement in Mathematics and 69.2% in Russian. Other potential sources of dissatisfaction such as home-school communication and support provided to students will be examined later in this chapter. If regular L1 programme parents at Maple and Oak gymnasia are equally dissatisfied with the regular programme, immersion parents' dissatisfaction may not be directly related to immersion. Those data are not available. Nonetheless, Maple Gymnasium and Birch Gymnasium need to identify why the majority of parents are expressing dissatisfaction with the programme.

Stakeholder satisfaction: teachers

Teacher-reported satisfaction with their decision to work in the immersion programme is high. Six teachers (23%) reported being very satisfied with their decision, 17 (65%) indicated being satisfied and three (12%) indicated that they were somewhat dissatisfied. One teacher did not answer this question. Two of the three teachers who indicated that they were somewhat dissatisfied came from Oak Gymnasium where six of the eight teachers felt that they lacked experience with immersion and had little immersion-specific training. This dissatisfaction can be seen as a risk factor needing to be mitigated, in particular because the school is located in a region where there is shortage of Estonian-speaking teachers. As discussed in chapter eight, inexperienced immersion teachers are more likely to resign, particularly if they do not benefit from mentoring, the sharing of resources and administrative support. Nonetheless, Oak Gymnasium has high levels of parent satisfaction (85%) with the programme, and 97% of its students reported that they were coping with studying through Estonian. It can be deduced that generally high levels of teacher satisfaction in the total population correlate with a belief that students are succeeding in learning through the L2.

Stakeholder satisfaction: school managers

School managers all reported being very satisfied (5 respondents) or satisfied (3 respondents) with their decision to work in the programme. Quotations from all eight school managers focusing on the reasons they choose to continue offering late immersion programming go beyond language learning and point to a more complex ecology:

It has helped the whole school to develop.

Our school wouldn't be where it is today without immersion.

The children's and the parents' motivation has improved.

In the beginning, I was very satisfied. Now less so.

Although some teachers did not believe in it, we had a team that did [...] now, we give a great deal, but get less in return.

Our graduates are studying in the Estonian Police College.

This is the first step on the road to integration.

Students are more able to compete.

Examination results have improved.

The students need this.

These statements indicate a belief that the immersion programme is a mechanism that leads to improved student learning and achievement. In addition the programme is perceived as contributing to increased student and parental motivation, and as a motor for school-wide reform. However, the fact that three school managers were not very satisfied with their decision indicates some doubt. These doubts would need to be raised and discussed within the school and with Immersion Centre staff. One of the above statements draws attention to a decline in personal satisfaction which the respondent links with giving a great deal, but not feeling that the work is being rewarded as richly as previously. This has the potential of leading to a decline in this manager's motivation, and speaks to the ever-changing and emergent nature of managing a long-term programme.

Stakeholder satisfaction: politicians and government officials

All six current or former politicians who were interviewed for this study considered the immersion programme to be a success. The current and two former ministers of education and research, two former ministers of population affairs and a former member of parliament judge the programme as having important impacts in addition to fostering language learning. They argued:

This [immersion programme] improves Estonia's competitiveness. If each individual makes the most of his/her⁷⁸ potential, Estonia's potential increases (Lukas, 2009).

⁷⁸

The third person singular in Estonian is gender neutral.

It [immersion] expands their [the students'] educational possibilities, provides greater job opportunities and, thus, this will help people feel better about themselves. [...] Every society wins with every additional language people speak. People can cope better and understand each other better, no matter what language they speak (Maimets, 2009).

Every person who through this programme has learned to speak another language, especially considering we are speaking about the official language, is a victory (Klaassen, 2009).

Language is such an important vehicle for communication. It helps bring these [Estonian-speaking and Russian-speaking] communities together, to integrate them. [...] It strengthens Estonian national security (Raudne, 2009).

With the immersion approach language learners preserve and even improve their L1 fluency. [...] Immersion programming helps balance the starting position of those who speak another language at home with that of native speakers of Estonian. This in turn helps guarantee stability and security [in society], and also supports the normal functioning of the labour market (Rummo, 2009).

Whereas political support for the programme is predicated on the belief that immersion will help students to learn to speak Estonian, the programme was also perceived as a mechanism for improving the life-chances of young Russian speakers, fostering their integration whilst contributing to social cohesion, increasing economic competitiveness, and fostering national security. The politicians demonstrated a shared belief system that values the education and integration of Russian speakers. The politicians' statements suggest that they view the immersion programme as part of a larger, more complex system that has an impact on social cohesion, economics and national security, giving further credence to the discussion in chapter two about the motivations for launching the immersion programme. In addition, these politicians are all either trilingual or quadrilingual. They have all experienced working in at least three languages. In other words, bilingualism is part of their reality and worldview, and thus clearly they see it as possible and beneficial.

In addition to the politicians, seven of the nine government officials interviewed for this study (current or former employees of the Estonian Ministry of Education and Research⁷⁹ (EMER), the Integration Foundation, the Immersion Centre and the Canadian Embassy) considered the programme to be a success. Although student achievement was generally raised by the officials as evidence of programme success, many took a much broader view. For example, an EMER official considered the programme:

⁷⁹

This is the EME's successor organisation.

[v]ery successful, one of the most successful in our education system [...] above all due to the knowledgeable work of the programme managers and the inclusion of all stakeholders right from the outset. Communication and going over things time and again. Several ministers were ‘forced’ in the good sense of the word to accept it [the programme] (Rebane, 2009).

Thus, success is not just predicated on student learning, but on the ability to convince stakeholders, and on management capacity. Rebane speaks of an ‘education system’ tying this to stakeholder cooperation and effective management. This would fit with this government official’s view of the value she and other stakeholders were adding to the system. Similarly a former EMER employee labelled the programme ‘very successful’ due to ‘very well developed work plans [...] good day-to-day programme management [...] steady partners at the Ministry of Education and at the office of the Minister for Population Affairs, which means that the political will was always there’ (Udde, 2010). Although this suggests the need for investing in programming, and planning, the comments also reveal an understanding that immersion programming is part of a complex system that includes stakeholder cooperation and management systems. When asked about whether the programme was a success or not eight out of nine officials began to define programme success through this broader lens. Programme success factors will be further explored later in this chapter.

However, there were two dissenting voices among the nine government officials interviewed for the study. The Immersion Centre’s former in-service training manager, Evi Mõttus, suggested that although the programme as a whole was successful, she did not feel this was the case after it began to ‘massively expand’. She argued that rapid expansion may have been a mistake and that perhaps political pressure to expand programming should have been resisted. During the expansion phase, the Immersion Centre was no longer able to work as closely with each new school or be as involved in the development, delivery and follow-up of in-service training. A planned system for training a cadre of consultants, who could support schools, was not in place during the initial years of the expansion. Mõttus argued that the expansion coincided with the Immersion Centre being further integrated into the Integration Foundation. She listed two primary reasons for leaving her job: a) a planned new contract which saw her job function change to ‘monitoring’, b) ‘a problem with management/leadership⁸⁰ at the Integration Foundation’ and the feeling that it was not her ‘role or in her power to train [the Foundation’s] inexperienced managers/leaders’. From Mõttus’ perspective, a decline in Immersion Centre autonomy and poor management/leadership by the Integration Foundation undermined programme success.

In addition, Georg Aher, the former secretary general of the EMER felt that the programme was ‘successful in only a few schools’. He stated that during the start-up phase ‘my expectations and optimism were high’, but that based on his current knowledge of the programme ‘a miracle has not occurred’. Aher’s expectations may have been unrealistic, as the immersion programme never

⁸⁰ The Estonian verb ‘juhtimine’ and noun ‘juht’ cover both the concepts of management and leadership.

consciously promised ‘miracles’. Aher’s initial belief in immersion as a mechanism for learning Estonian was based on meetings with immersion stakeholders in Canada.

In Canada I saw children in various schools whose language skills and achievement of intended learning outcomes was impressive. The probable cause was a supportive attitude in the home, a prevailing attitude in society at large, and the children’s belief that knowing two languages would be important to them in the future. Those were the reasons I supported the implementation of the immersion programme. [...]

Aher’s belief that Canadian students were successful in learning the L2 was likely influenced by meetings he and the accompanying Estonian delegation (myself included) had with students, teachers, school managers, parents, and local education authority officials, in which all the Canadian participants interpreted their experience with immersion in a positive light, expressing satisfaction with the programme, and saying that it had no negative effects on student achievement. Problematic issues such as the high attrition rate at the end of Grade eight were not discussed (cf. chapter seven). It is likely that the multiple perspectives of Canadian stakeholders, which were in harmony with one another, provided a sufficient sense of comfort with the idea of immersion for Aher to believe that it could be used as a mechanism for achieving similar results in Estonia. Moreover, the quality of the Canadian students’ L2 (French) was mediated by my interpretation from French to Estonian. I did argue that the students were making language errors, but as no one else in the Estonian delegation spoke French, they may have been influenced by my rapid pace of delivery and my ease in speaking Estonian.

Aher also appears to have placed too great an onus on students and their motivation and learning skills stating that ‘[a]ny methodology for learning is effective when there is enough motivation to learn and good learning skills.’ This comment seems to discount the need for effective methodologies to help improve student motivation and achievement (Hattie, 2009). In addition, judging the success of a programme based only on student success can be seen as placing the programme at greater risk than would be the case if a greater range of criteria were used such as effective management systems and teaching practices. It also points to the complicated nature of supporting stakeholders in developing realistic expectations. My own desire to unlock financing for the immersion project may have led me to overemphasise the potential of immersion and to underemphasise its potential shortcomings. Nonetheless, based on stakeholder discussions in Estonia and learning from the Canadian study visit the results-based management planning frameworks for programme development included an independent research cycle and other risk abatement strategies (cf. chapters two and three).

Stakeholder profiles

Student, parent and teacher questionnaires and school manager interviews reveal both commonalities and differences within the profiles of stakeholder groups. These commonalities

and differences in stakeholder beliefs, motivations, experience, and knowledge and skills sets have implications for programme managers.

Stakeholder profiles: students

The majority (98.6%) of students answering the questionnaire were aged 14-16. Boys constituted 31.2% and girls 68.8% of the respondents. Those figures indicate a gender imbalance. Information is not available about the general demographic make-up of the schools involved. There is also a paucity of information available as to whether staff attitudes or behaviours contributed to the gender imbalance, whether programme information/advertising contained any gender bias, or if there were other causes that contributed to this situation. Laurén (2000)⁸¹ argues that in the case of late immersion, stereotypical perceptions associating language learning with girls may have set in among boys and act as a barrier to their entry into the programme.

Students in the study indicated their reasons for choosing the immersion programme (cf. Figure 12.1). Over 80% of students in all four schools disagreed or somewhat disagreed with the statement that 'My parents made me do it.' Across the four schools, 71% stated that they disagreed and 15% somewhat disagreed with that statement. When I presented the students with an overview of the research results, students generally agreed with the statement that the majority of students made their own decision to join the programme.

Over 80% of students agreed with the following three statements:

- 1) 'I believe that participation in the programme will help me get a good job.' (53.1% agreed, 38.8% somewhat agreed);
- 2) 'The programme will help prepare me for future studies in an Estonian-language vocational school or university.' (50.7% agreed, 33.6% somewhat agreed);
- 3) 'People who live in Estonia should be able to speak Estonian.' (60.5% agreed, 22.4% somewhat agreed).

However exceptionally, 26% of Birch Gymnasium students indicated disagreement with the statement that people who live in Estonia should be able to speak Estonian, yet this is in marked contrast to the 87% who indicated that their participation in the programme would help them get a good job. This would suggest that a significant percentage (26%) of Birch Gymnasium students were not happy with having to speak Estonian, but half of those students accepted that speaking Estonian would help them find employment. Nonetheless, the majority of students in all four schools not only offered instrumental reasons such as improved employment opportunities for learning Estonian, but also expressed a belief that people living in Estonia should speak Estonian, thus implicitly accepting the central role of the Estonian language in Estonia. Although the majority of students did not report being interested in Estonians and their lifestyle, the majority (72%) did

⁸¹ Personal communication.

indicate that being able to speak Estonian would allow them to meet a larger number of people, signifying a belief that communication with Estonians is of interest to the majority of the students.

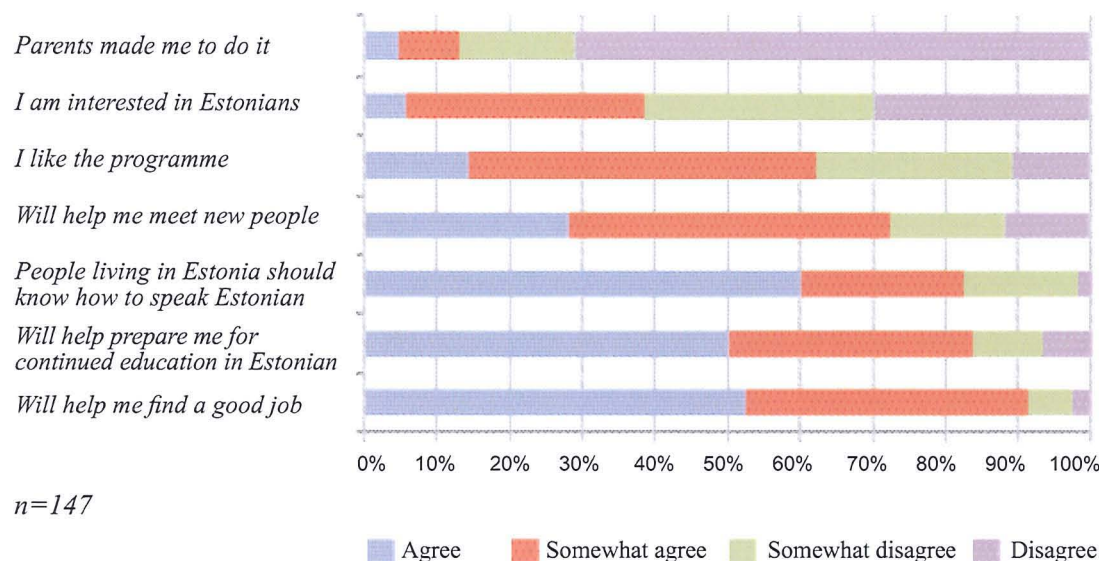


Figure 12.1. Student reasons for choosing immersion

Students reported that speaking Estonian would allow them to meet more people. By helping students to move beyond using language for academic purposes through contact and communication with Estonian speakers, schools can increase the chances that students will integrate with Estonian-language networks and that students will see the language as useful (cf. Murtagh, 2007: 450). As 46.5% of students indicated that they use Estonian outside of class four or fewer times per month and 21.5% of respondents one or fewer times per month, there is ample room for schools to support ways of increasing out-of-school language use (cf. Figure 12.2). In particular, this is the case with Maple and Oak gymnasia, which reported the lowest levels of out-of-school L2 language use. There was no statistically significant difference in the out-of-school language use by boys as against that of girls. Student-reported out-of-school language use varied among the schools and did not correlate with the ethnic make-up of their communities.

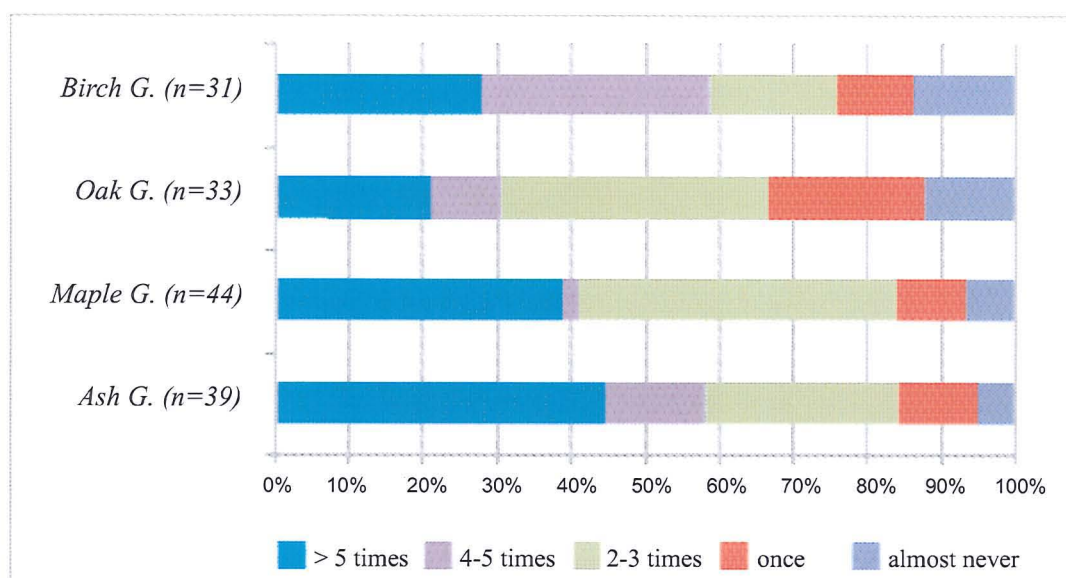


Figure 12.2. Percentage of students using Estonian outside of school per month

Stakeholder profiles: parents

Parents can be characterised to some extent by their answer to the question ‘why is your child in the immersion programme?’ (cf. Figure 12.3). Parental answers to this question indicate that they primarily value a good education (94% of respondents), the opportunity for their child to develop fluency in Estonian (91%) and the development of the child’s L1 (74%). This coincides in large part with the key concerns of parents and many education officials from across many jurisdictions discussed in chapter six. However, there was some variance among the four schools with 17.6% of parents at Birch Gymnasium noting that they did not choose the programme because it will help their child to develop fluency in Estonian. This may be a result of the programme being obligatory at Birch Gymnasium. Finally, the fact that the school is near their home and that their child’s friends study in that school is important to over 60% of parents.

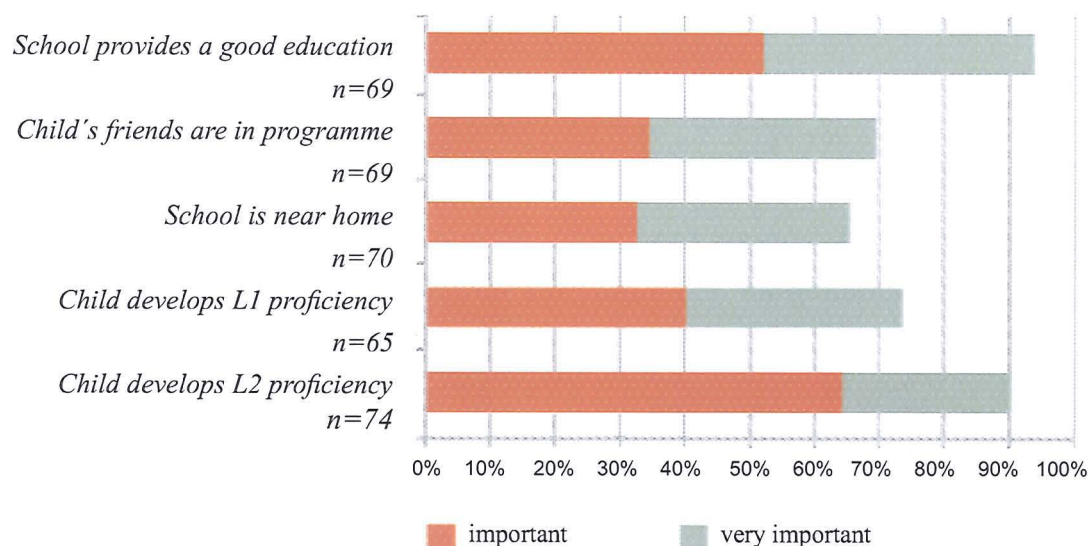


Figure 12.3. Parental reasons for choosing and keeping their children in the programme

Stakeholder profiles: teachers

Of the 27 teachers answering the questionnaire 21 reported having 6 or more years of teaching experience of whom 14 indicated having 11 or more years of experience. Four had three-five years of experience and two were in their first year of teaching.

Table 12.2. Teaching experience in general

0–1 year	1–2 years	3–5 years	6–10 years	11–15 years	16 years	No response
2	0	4	7	4	10	0

Teacher experience in immersion is less extensive. Three teachers reported being in their first year, five in their second year, and 17 in their third-fifth year of teaching immersion classes. One teacher reported working in the programme for over 6 years. One teacher did not answer this question.

Table 12.3. Teaching experience in immersion

0–1 year	1–2 years	3–5 years	6–10 years	No response
3	5	17	1	1

The fact that 33% of the respondents were in their first or second year of teaching in the programme is significant because novice teachers tend to need more support than experienced colleagues (Ewart, 2009; Karsenti *et al.*, 2008). This has management implications for school managers and the Immersion Centre for both need to develop the capacity to ensure novice teachers receive the requisite professional development, mentoring, access to learning materials and are supported in identifying problems and solving them. There is also reason to believe that immersion programmes will always include novice teachers and thus those managing these programmes will need to have the long-term capacity and mechanisms in place to support these teachers. Moreover, as discussed in the previous chapter, lesson observations showed that experienced teachers faced new challenges when teaching through the students' L2, and that this could, due to teacher beliefs and lack of knowledge and skills, lead to impoverished learning environments for students. This implies that even experienced teachers can be considered novices when they are new to immersion or when teaching students at a new Grade level.

Prior to becoming immersion teachers 78% of respondents indicated that they worked in a Russian-language school: 63% worked in the same school teaching their subject(s) through Russian (30%) or as an Estonian language teacher (33%), 15% worked in another Russian-language school, 7% were students and 7% worked in an Estonian-language school. One teacher indicated that she did not work in a school and one worked as an accompanist in a sports school. Thus, the majority of immersion teachers were hired from within Russian-language schools, indicating that schools prefer to maintain the *status quo* and avoid perturbations that may result from firing existing or hiring new staff. However, 74% of immersion teachers reported Russian as their strongest language. This and the impression gained during lesson observations indicate that a significant percentage of these teachers require continued Estonian language training.

Almost 90% of teachers reported that they had not attended or were not attending a university course in immersion. Narva College is the only institution of higher education in Estonia offering a qualification in immersion. The majority of immersion teachers have been trained through the schools or the Immersion Centre. It is also possible to work in the immersion programme with no immersion-specific training – 30% of respondents reported that they had never attended immersion-specific training sessions. Amongst teachers having two or less years of experience, 38% had, or were taking part in, immersion training. By contrast, 83% of teachers with over two years experience had received training. Among the inexperienced teachers, 25% had attended or were attending a university course in immersion. Moreover, 32% of teachers 'disagreed' or 'somewhat disagreed' with the statement that they were adequately trained to teach in immersion. Of particular concern is Oak Gymnasium where six of the eight teachers reporting indicated that they 'somewhat disagree' that they have been adequately trained in immersion. Taking into account the extra challenges of teaching through the L2 and the risks incurred by schools having inexperienced staff, this lack of training can be seen as a risk factor in this school. From a management perspective schools may need differentiated levels of support. Teachers at Oak Gymnasium are likely to require more training than teachers at other schools. However, it is unlikely that all six Oak Gymnasium teachers reporting insufficient training could be released at

one time from teaching for training. Thus, training providers may need to come to the school to deliver training after classes or during holidays, or provide in-class mentoring. Finally, as lesson observations demonstrated that several teachers at all four schools have considerable scope for improvement, it can be argued that the analysis of in-service training needs should include data and opinions from multiple sources and consider the implications that the current state of affairs has for training other stakeholders such as school managers and Immersion Centre staff.

Stakeholder profiles: school managers

School managers are highly experienced. In three schools they have managed the programme since its launch in 2003. In Oak Gymnasium, the deputy headteacher reported being in her first year in that role and the headteacher as having 3-5 years experience. These two individuals have not had the same opportunities as the other school managers to learn about teaching through the L2 and how to manage such programming. They have had fewer opportunities for structured dialogue organised by the Immersion Centre to discuss their feelings and understandings regarding immersion. They have had fewer opportunities to plan for programme development with the other schools, and thereby to create ties and cooperate with other schools. Oak Gymnasium also has the largest number of inexperienced immersion teachers, yet 97% of students felt they could cope with the programme.

All school managers have strong ties with bilingualism. All speak both Russian and Estonian. Several majored in a second language at university, some come from multicultural and multilingual homes, and all have made an effort to be bilingual or trilingual. Four of the eight majored in Mathematics, Physics or another Natural Science. From 2003-2007, the Immersion Centre organised considerable in-service training for school managers. With the exception of one person who was in her first year on the job, all the other school managers estimated that they received between four to eight weeks of immersion-specific training in total. This thesis has argued that teaching through the students' L2 requires considerable skill and as such programme sustainability is dependent to some degree not only on the adequate training of teachers, but on school managers understanding teaching and learning in bilingual education and being able to act as curriculum leaders. As discussed in chapter eight the management of an immersion programme requires specialised knowledge and skills, hence appropriate types and amounts of training can be seen as an important potential contributor to programme sustainability, and the lack thereof as a potential risk.

School managers reported a decline in training opportunities on offer through the Immersion Centre in the academic year 2007/08. School managers indicated receiving between 0-12 days of training during that year with the majority reporting having received two days of training. As discussed in the previous chapter several teachers were having difficulties in teaching through the L2, suggesting that headteachers should consider the option of introducing new measures for supporting teachers. In addition, as discussed in chapters three and eight, the complexities

of immersion programming are emergent in nature. As a programme moves through a school from more junior into more senior Grades, it can be assumed that new challenges will present themselves, making it advisable for school managers to continue to receive professional development opportunities in order to help them to guide continued programme development and to maintain programme sustainability.

For school managers, the term in-service training had a wide scope of meaning. Two headteachers reported seeking out training courses. One headteacher recently completed a masters degree. Her thesis analysed the development of the immersion programme in her school. School managers at three schools reported that they organise conferences themselves or that they take part in conferences organised by other schools. They considered school-organised conferences as an important means of fostering staff professional development. Two schools organised a conference for parents and an immersion day for their students, teachers and partner schools. One school reported offering regular programme teachers language training in Estonian. In this case, the trainers were the school's own teachers. One headteacher summarised these three initiatives as follows:

Every year we organise a two-hour conference on immersion. Usually we speak of: what the students have accomplished; problems and solutions; the school strategic plan and how immersion impacts on it. About 125 parents attend. The school psychologist and social worker also take part. [...]

We also organise an immersion day. [...] The day is managed by our immersion teachers. The key participants are students. The goal is to strengthen ties with other immersion schools and Estonian-language schools. This is our opportunity to present ourselves to others, and to strengthen our sense of team. This helps teachers take greater responsibility for the programme. It is financed from the school budget. [...] It creates a lot of positive emotions, but also requires a lot of hard work. [...] Everything doesn't always work out ideally. It is a learning process. Teachers learn to assume responsibility. Our school's reputation is in play, so people make a real effort.

Young teachers take part even if they are not immersion teachers. The responsibilities of each person are described in writing. The organisation of the immersion day has brought to light active teachers, those into whom one should invest in the future. This motivates others to work with the immersion programme. For example, the IT teacher has helped a great deal. This helps regular programme teachers cooperate with the immersion teachers. Immersion has helped to attract new students to the school, and this in turn, has helped give people work. This has motivated younger teachers to learn to speak Estonian and to teach in the immersion programme. [...]

This summer we organised an Estonian language course for our elementary school teachers. [...] The Estonian language teacher who organised the course is young. She learned a lot from the older teachers that took part in the course. I let young people

take responsibility. [...] You have to support the young teachers, not start to take on their responsibilities. Teachers are responsible for their own work.

By stressing how teachers have been given responsibility for organising training and how they learn through this process and from one another, this headteacher prioritises efforts to distribute leadership, to foster learner autonomy among teachers and the development of a professional learning community. As she made no disparaging remarks about any teacher or groups of teachers her attitude reflects a constructive and inclusionist ethos – young and older teachers and immersion and non-immersion teachers working together. She identifies numerous other stakeholders including those willing to take initiative, students, parents, other immersion schools and Estonian-language schools. She has clear goals stating that her aim is ‘to strengthen ties with other immersion schools and Estonian-language schools’ and she aims to foster a belief in values such as the school’s reputation. She appears prepared to accept that mistakes will be made, but sees these as vehicles for learning and building self-reliance. This view is further reinforced by the headteacher arguing that her role is to support teachers, but not to take on their responsibilities. It shows that she is willing to share power and values teamwork.

Stakeholder intentions

Stakeholder intentions can help reveal whether immersion stakeholder satisfaction also translates into a commitment to programming. For Grades 10-12, 65% of all students reported intending to remain in immersion, 32% were undecided and 6% were intending to transfer to an Estonian-language school. The undecided percentage is high enough to warrant further exploration and can be considered a potential risk to programme sustainability. Student intentions can also be gleaned from the above-reported reasons for choosing the programme: helping them get a good job (92% of respondents); preparing them for further education (84%); people living in Estonia should speak Estonian (83%); and helping them meet more interesting people (73%). These all solidly point toward the students seeing their future in Estonia.

Parents overwhelmingly (97% of respondents) expected their children to continue in the same school for Grades 10-12. Parents’ views of their children’s long-term future substantially differed from that of their children with 51% reporting that their offspring will live in Estonia once they have completed their education, some adding the proviso: ‘If they find work’. A further 16 % said the choice is the child’s. The remainder (33%) saw their children living abroad. As people are strongly influenced by one another (Thaler and Sunstein, 2008), this significant percentage of parents who see their children living abroad may be seen as having the potentiality to undermine social stability and cohesion in Estonia. People who have been educated by the state and who leave the country can be considered in terms of a lost return on the capital invested in their education and the loss of their potential future contribution to the national economy. Government officials and politicians may wish to use this information to further engage with parents to foster their and their children’s integration into Estonian society.

The majority of teachers (77%) intend to be teaching in five years, 16% indicated a desire to be trainers, 4% deputy headteachers, 8% headteachers, and 4% working in another job. Some teachers saw themselves in two roles. This suggests 96% of teachers continue to see their future in relation to the programme. As the acute shortage of immersion teachers was identified by all school managers as a priority issue, and as teacher intentions imply a significant level of teacher turnover, planners will need to take this into account. Further, schools may wish to explore how to allow teachers who wish to be trainers to pursue that interest while also helping them to see the benefits of concomitantly remaining in the classroom.

All headteachers intend to be working in the same position in five years. Three of the deputy headteachers intend to leave their position. Two expect to retire, one plans to return to teaching. This has serious implications for the programme as the deputy's role is crucial in building cooperation among teachers and in spearheading teacher professional development. Moreover, it is possible that a highly experienced teacher will be promoted to the position of deputy head. A strategy needs to be in place to train and support newly appointed deputies in assuming their role, and for replacing any teachers that are promoted into management.

School ethos: relationships

In general, teachers and headteachers feel professionally valued and believe they have good relationships with others in their school community. More specifically, 100% of school managers and over 90% of teachers reported that school managers respect them and value their work, and that the students like them. Over 80% of teachers felt that they could discuss problems with school managers. All school managers and over 80% of teachers felt that parents respected them, and that they had a good working relationship with colleagues. As discussed in chapter nine, high levels of mutual respect and trust are particularly important in complex organisations and systems as are rich opportunities for frank and open dialogue, for building a common knowledge base and sense of purpose. These are prerequisites for the development of a professional learning community.

However, when asked separately about immersion and regular programme colleagues the figures tell another story. There is room for creating greater synergy with regular programme teachers, as 40% of immersion teachers disagreed with the statement that regular programme teachers support them. Maple Gymnasium stood out from the other schools with 60% of teachers disagreeing with the statement that regular programme teachers support them. However, only half (five) of the immersion teachers at that school answered this question. Although overall 79% of teachers agreed that immersion programme teachers support them, 57.1% of teachers at Oak Gymnasium disagreed with that statement. In addition, 50% of Oak Gymnasium respondents did not feel that their immersion teachers constituted a good team. In contrast, 100%, 85.7%, and 80% of teachers at Maple, Ash and Birch gymnasia respectively indicated that their school's immersion teachers constituted a good team. Immersion requires considerable cooperation among teachers in order to plan common language outcomes and to develop cross-curricular projects. High levels of

teamwork are likely to foster student learning and low levels may well undermine the construction of effective learning environments. In addition, maintaining a focus on immersion and non-immersion staff cooperation may help avoid the two-schools-in-one phenomenon discussed in chapter eight. The perceived lack of teamwork and cooperation at Oak Gymnasium can be seen as a risk factor for their immersion programme, particularly as this school has the largest number of inexperienced immersion teachers.

Parents feel somewhat less positive about the school ethos. The following percentages of parents either strongly agreed or were in relative agreement with the following statements: 'the school provides adequate support when my child needs help' (46%); 'the school takes into account parents' opinions, proposals and concerns' (47%); 'I feel welcome at school' (54%); 'the headteacher is open to dialogue including discussing problems' (68%); 'the deputy headteacher is open to dialogue including discussing problems' (70%); 'the teachers are open to dialogue including discussing problems' (72%); and 'the Grade coordinator is open to dialogue including discussing problems' (74%). These figures suggest that about half of parents do not feel their child receives sufficient support or that parent opinions are taken into account. In particular, Maple and Birch gymnasias parents reported higher levels of concern. In Maple and Birch gymnasias 69.2 % and 66.6% of parents respectively disagreed with the statement that they feel welcome in school, and 61.5% and 79.7% disagreed that the school provides adequate support when their child needs help. Furthermore, at Maple Gymnasium 53.9% of parents disagreed with the statement that the deputy headteacher was open to dialogue, and 75.8% disagreed with the same statement regarding the headteacher. At Birch Gymnasium those figures were 50% and 37.5%. In addition, 64.3% of parents at Maple Gymnasium and 50% of parents at Birch Gymnasium disagreed with the statement that the Grade coordinator was open to dialogue. At Maple Gymnasium 64.3% of parents and at Birch Gymnasium 53.3% of parents disagreed with the statement that teachers were open to dialogue. As Maple and Birch gymnasias parents expressed the highest levels of dissatisfaction with the programme (71% and 56% respectively) the source of their dissatisfaction may well reside in their perception of how open the various members of school staff are to dialogue, and the extent to which parents believe their child is being supported.

Raising parents' comfort levels is likely to require a concerted effort by the schools in cooperation with training providers and the Immersion Centre. Schools will need to analyse their current practices for working with parents, and plan interventions to improve the situation. In particular, this is the case with Maple Gymnasium and Birch Gymnasium. All schools may require external support. Parents may lack information about how the school is working to support each child or they may lack the language of schooling required to fully discuss in comfort their child's education with school staff (Hattie, 2009: 63). In any case, parent support appears tied to a complex set of factors that go beyond student achievement.

School ethos: information sharing

Teachers and school managers reported using a wide variety of means to pass on information to parents about the immersion programme. Generally speaking, parents concurred with what teachers and school managers stated about information flow. Nearly all the teachers (92 %) reported sharing programme information at meetings for all school parents. School managers reported doing the same. As stakeholders constitute those individuals or groups that can influence a programme or those that can be affected by it, and parents constitute an important stakeholder, then it is appropriate to share information about immersion programming with both immersion and non-immersion parents. Non-immersion parents can support these programmes, be indifferent to them, or resist them. Information about the programme is likely to dispel misunderstandings, increase awareness and reduce resistance to it.

Teacher statements about how the school informs parents fit with parental statements about how they receive information. In Figure 12.4, parental indications of how they receive information that exceed teacher perceptions of how information is shared with parents are shown using positive numbers. In instances where parents indicated a source of information about immersion as less frequently used than that reported by teachers, a negative figure is used. The smaller the distance on either side of 00, the greater the extent to which parental opinions coincide with teacher opinions.

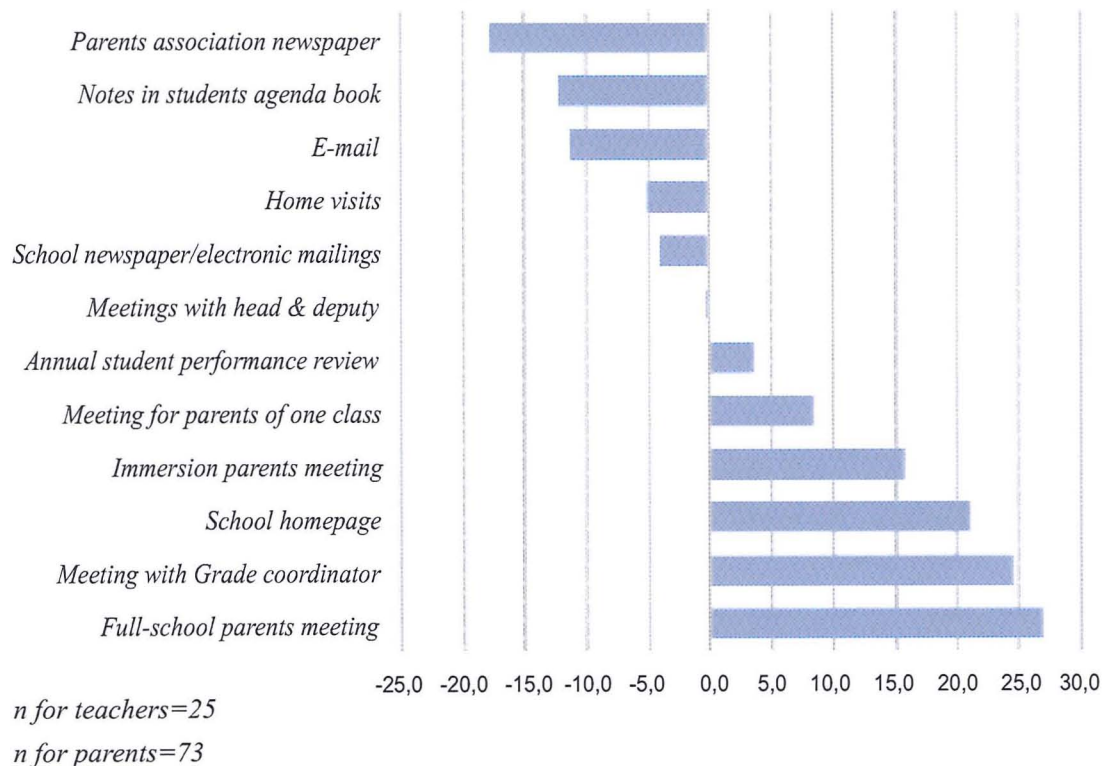


Figure 12.4. Percentage difference in parents' perceptions about information flow in reference to teachers' perceptions

Teachers were overestimating the reach of the Immersion Parents Association's newspaper, student agenda books and e-mail. As parents noted, receiving most of their information about immersion from school meetings, meetings for one particular class, meetings with the Grade coordinator, the school home page, immersion parents meetings, and from meetings with the headteacher or deputy head, it is worth considering how to improve information flow using these channels. Further, with the exception of meetings with headteachers and deputy headteachers, teachers underestimated the use of these channels for information flow. In general, it is personal contact between the school and parents that leaves the strongest impression as a source of information. Still, the school's home page is a more important source of information for parents than teachers have estimated.

The majority of parents (69.4%) felt that they receive enough information about their child. However, Maple and Birch gymnasias differ from the other two schools, with 61.5% and 68.8% of parents respectively disagreeing with the statement that they receive sufficient information about their child. Over 50% of parents in the total population wished to have further information about third language learning, programme development in Grades 10-12, teaching methods, teacher qualifications, how to support their child in immersion and the evaluation of achievement. This perceived lack of information may be contributing to parental dissatisfaction and as a result parents may not have sufficient information about programming to make informed decisions. As this thesis has argued that cooperation with parents is considered a key factor in the success of immersion programmes and the sustainability of every organisation is dependent on its stakeholders, it is possible to conclude that effective cooperation with parents, which addresses their concerns and takes into account their wishes, is central to maintaining Estonian late immersion programme sustainability.

Programme success factors: teachers and school managers

All school managers and the majority of teachers considered the following two types of factors as central to the success of the programme – initiatives undertaken by the school, and those undertaken by the Immersion Centre. First, they suggested the following school-based initiatives:

- 1) allocation of school budgetary resources to the programme;
- 2) headteacher and deputy headteacher support for the programme (sense of mission and effective programme management);
- 3) support of the programme in general, and moral support of teachers;
- 4) cooperation with parents.

Second, they suggested the following initiatives managed or coordinated by the Immersion Centre:

- 1) teacher in-service training;
- 2) development of learning materials for immersion students;
- 3) centralised management and coordination of the programme.

Emphasising their role as being central to the success of the programme, school managers are showing that they have taken ownership of and responsibility for the programme. Furthermore, five school managers considered the school's own research into the programme or independent research into student achievement as key programme success factors, which implies that a high value is placed on investigating the school's own practices. The fact that three school managers did not report the school's own research as contributing to programme success can be considered as a potential risk factor, as these individuals may not collect or use research data that could facilitate more informed programme development initiatives. It is also noteworthy that the EMER's 4 August 2006 directive number 23 entitled 'Terms, conditions and procedures for self-assessment in schools and pre-school child care institutions' requires schools to conduct their own research.

The majority of teachers indicated the following factors to have either greatly or significantly contributed to programme success: the moral support of school managers (100% of teachers); students' hard work (92% of teachers); teacher in-service training (81%); the school's own budgetary allocations to the programme (85%); effective management of the programme by headteachers and their deputies (76%); cooperation with parents (73%); and the management of the programme by the Immersion Centre (60%). Teacher perceptions of the Immersion Centre as a programme success factor may be influenced by the fact that 30% of teachers reported that they had not taken part in in-service training. The fact that teachers identified several factors and types of stakeholding that have contributed to programme success reinforce the view that immersion programmes are complex in nature.

Support by the EMER was considered by 52% of teachers and by five of eight managers to have greatly or significantly contributed to programme development, indicating that a significant number of teachers and school managers do not fully recognise the Ministry's contribution to programme development. The Ministry has financed the Immersion Centre and its activities which include: the organisation of in-service training; development of learning materials; coordination of programme research; and public relations. Less than half of the teachers considered the local government's support to programme success as great or significant, suggesting that schools and local government work more closely together to address joint interests and implementation of plans, and publicise that work.

In addition, there was a general consensus among the school managers that the state needs to maintain the *per capita* financing premium for immersion students and continue to finance research pertaining to late immersion and the centralised creation of immersion-specific learning materials. The further financing and development of pre and in-service training for teachers was also considered a priority. School managers also wished to see increased financing for language camps or other vehicles that increase students' contact and communication with Estonian speakers. They wanted the state to create a position for and finance teaching assistants. They had one low-cost request, asking for diplomas to indicate that immersion students have graduated from an immersion programme. Six school managers expressed concern about the declining role of the Immersion Centre, and called for a strengthening of the Immersion Centre's capacity to lead

programme development and/or to provide schools with additional support. Although schools did network amongst each other, they felt a need for centralised support from the Immersion Centre in facilitating inter-school cooperation, networking and planning for changes associated with immersion. Once again, this points to an understanding by school managers that immersion is part of a larger ecology requiring a wide range of investments, a broad and in-depth skills set, and some level of centralised leadership.

Success factors: politicians and government officials

Politicians and government officials also pointed to a wide variety of factors that contributed to programme success. These factors can be divided into: forces and mechanisms. Two driving forces are autonomy and learning. Decision-makers were given an opportunity and sufficient time to learn about immersion. For example, Kai Völli who had originally been against immersion explained that she changed her mind due to the learning opportunities she was afforded. The first seminar exploring the immersion option (cf. chapter two) and particularly the opportunities for group work during that seminar acted as mechanisms for learning about immersion.⁸² In addition, she was ‘nudged’ (Thaler and Sunstein, 2008) to accept the idea by seeing a critical mass of people she ‘respected support the idea’ (Völli). Thus, the seminar can be seen as vehicle for shared cognition leading to the co-construction by relatively like-minded people of a commonly held understanding which was articulated, after lengthy, detailed and occasionally tense discussion, in the final seminar communiqué. The communiqué was both an embodiment of what had been learnt during the seminar and a mechanism which was to be used for starting programme development, by calling on the Ministry of Education to take certain concrete measures to establish an immersion programme.

Importantly, learning was not the purview of any one stakeholder group. Völli said the organisers inspired confidence as they prioritised from the outset ‘the role of politicians, school authorities, education officials, researchers, school managers and teachers.’ Käosaar also mentioned trainers, authors, journalists and foreign partners. Learning involved open and frank talk, and required participants to navigate some level of pain or discomfort. In addition, learning was seen as leading to concrete products or mechanisms such as ‘a results-based plan for the National Action Plan for Integration’ (Mätlik). Käosaar adds that:

Whoever you would ask, who in some way was tied to this process – teachers, school managers, assistant teachers who were also trained and helped, parents, education officials, learning materials authors, artists, anyone who gave to the programme – I am convinced that they all would say that they developed professionally, that they learned something new, that they were enriched and that they actually passed this knowledge and information on to others. [...] After the first year, research

⁸² Cf. also Member of Parliament Raudne (2009) who in chapter three points to the value of having an entire week in Canada to learn about and deal with planning for immersion.

results showed there was a problem with Science. [...] Teachers had to review the curriculum and in part start to redo their own work. [...] Texts [in textbooks] were rewritten, even though that may have been painful for people who had worked hard on them. Even the pictures and drawings [in the textbooks], there was a lot of to and fro with the artists. Pictures were redrawn. [...] Training companies and trainers had to learn, and adapt their products.

Planning was another driving force mentioned by most decision-makers. Programme plans were described as 'strong' (Raudne), 'systematic' (Käosaar; Maimets), 'well done [...] of unprecedented quality' (Saks), and 'well written with clear and measurable outcomes' (Udde). Völli stated that plans were 'multi-levelled/focused including [...] monitoring, drawing in stakeholders, building partnerships and proper information-sharing'. Mätlik stressed the clarity of the plans including 'programme goals and activities' and their 'long-term' nature that allowed government to easily see the long-term commitment required and the potential return on the investment. For Mätlik, the Immersion Centre's results-based approach was 'exemplary' and an important force in convincing government – the plans related to financing and implementation. Völli also described the Immersion Centre's plans as 'pedantically detailed' which 'inspired confidence'. Käosaar argued that 'stakeholders had a say in the plans and this meant they took ownership for them.' Thus, it can be said that these plans crossed the threshold of being isolated documents, but existed in symbiosis with stakeholders and government structures.

One of the most pervasive forces supporting immersion programme development described by decision-makers was the inclusion of a broad range of stakeholders who were able to influence programme development (Asari; Käosaar; Mätlik; Mjalitsina; Raudne; Rebane; Saks; Udde; Völli). Travel to Canada and Finland, conferences, and seminars constituted opportunities for stakeholders 'to breathe the same air' to jointly learn and jointly decide on what 'face' to give the programme (Asari). These were important mechanisms for programme development, as were the agreements that came out of these events. Mätlik suggested that 'the Immersion Centre succeeded in managing stakeholder cooperation in a 'skilful manner' leading to 'long-term agreements' that have also been 'long-standing'. Travel to Canada (and Finland) was for many decision-makers an important mechanism for learning about immersion programming, including related research. 'Seeing for myself' was described as essential in convincing people of the merits of programming (Aher; Käosaar; Rebane; Saks; Udde). This suggests that autonomous learning and personal experience helped shift beliefs. Study visits also involved affording opportunities to stakeholders for openly discussing their understandings and allowing for dissent, yet discussions had to remain constructive and be skilfully managed. Maimets proposes that one mechanism for obtaining stakeholder agreement lies in seeking out those mainstream discourses which are held in common by most people, such as saying to parents: 'if you want your children to continue to live in Estonia [...] you are restricting their options for their future' if their education does not provide them with fluency in Estonian.

Raudne, who participated in the Immersion Centre's strategic planning exercise in Canada, maintained that a group work exercise, which sought to determine how participants in the planning exercise could support the implementation of the plan, drew him in as a long-term stakeholder. As someone who believed in supporting citizens to become active members of civil society, Raudne committed to help launch an Estonian Association of Immersion Parents. He created draft statutes for the organisation, invited parents to the Parliament to review these, and helped to register the organisation. He applied for financing for the organisation and spent several years supporting parents in running it. He created mechanisms for launching and running the Association. In 2009, Raudne noted that for the last three years the parents had run the organisation themselves – organising events, publishing their own newspaper and seeking financing. This shows the importance of stakeholders supporting one another. Võlli underscored how important it had been for schools always to be willing to communicate with the outside world about their achievements. Current or former Government ministers, Maimets, Lukas, Saks, Klaassen and Rummo, saw their roles as supporting those running the programme, and in recognising the achievement of teachers and school managers.

Although it is possible to characterise stakeholder cooperation as driven by learning, autonomy and shared decision-making, there were exceptions. The city of Narva was not prepared to establish a municipal immersion programme as local politicians appeared more interested in maintaining their existing programmes relating to their position as a primarily monolingual, Russian-speaking city. The central government had to take over a municipal school and establish a state school in order for the programming to be launched (Saks). In this case consensus was not an option and Government used its authority to establish a school, in order to provide parents with voluntary access to their preferred educational option – bilingual education (Vassiltšenko, 1999: 60).

Programme financing was also mentioned by decision-makers as a key success factor. Canadian financing was important (Klaassen; Asari; Udde; Saks) as was the steady financing by the Estonian Government (Käosaar). Klaassen, Käosaar, Saks and Võlli considered investments into learning materials creation to be vital. Võlli drew out the importance of the 'initially flexible financing: a lack of inflexible and highly detailed regulations regarding use of finances'. Flexible financing can allow for the emergent nature of a complex system where it is not possible to foresee all the needs of the various stakeholders. For example, newly emergent training needs can be addressed if the entire training provision does not have to be planned in advance. Saks argued that new organisations need initially to be given 'freedom to grow'. At a school level, a higher rate of *per capita* financing for immersion students was seen as an important driver in programme development (Käosaar; Raudne); however, Raudne felt it was insufficient stating that a further increase could serve as a motivation for expanding programming. He felt that this would save society money as higher levels of social cohesion would reduce the extent of social problems in the future.

Most decision-makers mentioned drivers that belong to the affective domain. Several decision-makers argued that those involved in programme development were doing it out of 'a sense of mission' (Asari; Käosaar; Lukas; Maimets; Rebane; Rummo; Saks; Udde). Maimets suggested that those running the programme were clearly 'not just doing it to earn a salary' and this was one reason why he supported the programme. Asari said many of those involved were working 'beyond the call of duty'. Several decision-makers mentioned how important it was to have faith in the people developing the programme and/or in the immersion approach (Asari; Käosaar; Lukas; Raudne). It also required a leap of faith to believe in the potential of the programme and that it would be well implemented in Estonia (Raudne; Asari). Equally importantly in the initial stages of programme development people had to suspend their disbelief in the immersion programme in order to be prepared to learn about it. Klaassen and Käosaar spoke of needing to help people process fears associated with the programme. Furthermore, Mätlik, who was a former Immersion Centre steering committee member, said that committee members developed a 'personal connection' with the Centre and the programme. 'Trust' developed among stakeholders (Asari; Käosaar). Völli stressed that programme managers emphasised 'feelings' and demonstrated 'caring' for individuals, which she saw as factors contributing to programme success. Asari concurred, arguing that people were remembered and contacted years after their contribution to the programme. Völli further commented that a 'teamwork culture' was developed that helped 'to create a sense of belonging.'

The Immersion Centre was a key vehicle or mechanism for facilitating stakeholder cooperation and programme planning and coordination (Asari; Udde; Raudne; Rebane). In addition, its managers were described as 'politically and socially accepted' (Asari) and highly 'competent' and 'skilful' (Klaassen; Maimets; Rebane; Rummo; Udde). They 'knew how to ask' and by preparing documents for stakeholders they 'made it easy for others to decide' (Asari). There was a clear sense among decision-makers that ideas are plentiful, but that structures and people are required to bring them to life.

Despite being highly praised, considered a key mechanism in programme development, and having heateachers call on its role to be reinforced, the Immersion Centre's future became uncertain. The Centre's first director took a job at the EMER and was replaced by Natalja Mjalitsina in 2007 who wrote in 2010 that initially:

Seven people worked at the Centre with me. All were experts in their field. The work climate was open and a team spirit prevailed. Everyone was an immersion fan, everyone had his/her area of responsibility, but the whole programme was also being developed together. The Centre was a real centre: open to everyone (partners, university students, visitors), library, possibility for meetings.

Every Monday there was a programme development meeting, from my perspective the most important programme development instrument. The chair of the meeting rotated (great opportunity for taking and sharing responsibility). Everyone could raise issues. Essential things were discussed which helped move the programme forward.

[...] everything was discussed together. Everyone was invited to speak about other people's agenda points. [...] The immersion programme was relatively independent in planning its activities (budget, activities, [...] work plan, work processes). [...]

Upon returning from maternity leave in 2010 the Immersion Centre had been merged with a unit in the Integration Foundation and had moved from its own offices into the Integration Foundation's office space. [...] Everything had changed: of the seven positions allotted to the Immersion Centre only 3.5 remained. This was incomprehensible and unjustified: the programme continued to expand whilst we were also going in-depth (emphasising quality), and the EMER had not reduced its expectations or budget allocation. Immersion staff worked in the Foundation's offices where visitors were not welcome, and there was little meeting space, and the library was integrated [making it harder to find materials]. [...] Those dealing with immersion were [...] spread out [...] into three separate offices, and this based on a decision made by the new head of the unit [that took over the Immersion Centre's responsibilities]. No more regular meetings took place. The right to hold immersion meetings had been regained, but only if the unit head could be present. As a time that suited her could not be found, meetings were not held.

[...] Based on discussions with the director and the deputy director of the Foundation we arrived at a common understanding, that immersion [...] could have its own programme manager. [...] We got the right to start having weekly immersion development meetings (independent of the unit manager's possibility of being present). [...] In April, we were supposed to have a meeting to discuss the immersion programme manager's job description, and it turned out that the Ministry of Culture would not allow this position to be created (my claim that we were under the EMER, was ignored). The final straw came when the head of the unit stated that she did not consider it important for immersion to have a manager. [...] This person's [the unit manager's] participation at steering committee meetings, programme development meetings, and other events, can be described as nothing more than being present in the room. [...] What is difficult to understand is that the Foundation's management supported this management culture.

Mjalitsina's quotation reinforces the views held by other stakeholders of the Immersion Centre's initial work practices, and its later decline in leadership and management capacity. Although Asari, Mätlik, Möttus and Käosaar raised concerns about the way the programme was being managed after 2007, Mjalitsina's quotation shows how much damage can be inflicted on an organisation despite a history of good management, and despite widespread awareness of there being an emerging problem. Mätlik, the Director of the Integration Foundation, and Käosaar, who was on the programme's steering committee, both mentioned a lack of leadership as the main reason for this. Both these individuals shared considerable responsibility for programme management. However, schools continued to function, and former Immersion Centre staff continued to work. One immersion programme staff member suggested that in this new climate the 'primary goal

is to protect the programme from damage' from its managers. In November 2010, the Director of the Integration Foundation resigned and in January 2011 an Immersion Unit was established in the Foundation as a successor organisation to the Immersion Centre. As Käosaar (2010) stated, the Immersion Centre brand was too strong to simply be phased out. Currently the Immersion Unit has five employees.

Conclusion

There is a high level of consensus among school managers, teachers, students, parents, politicians and officials that the late immersion programme is a success. However, despite a large majority of students reporting that they can cope with learning through the L2 almost one third are undecided about what they will do after Grade nine, despite the fact that over 97% of responding parents see their children continuing to study in the same schools in Grades 10-12. In addition, parents at two late immersion schools expressed high levels of dissatisfaction with the programme despite the fact that the overwhelming majority of students at those two schools said that they were coping with the programme, and that in one of those schools the overwhelming majority of students reported that they liked the programme. Parent dissatisfaction may be associated with home-school communication issues, as a significant number of parents in the total population felt that some school staff members were not open to dialogue. Moreover, approximately half of the parents reported not feeling welcome at the school, that the school did not take into account their opinions, proposals and concerns, and that the school did not support their children when in difficulty. This suggests a need for stakeholders to raise awareness of one another's understandings and beliefs.

Different stakeholder groups judged programme success from different perspectives, with politicians and some government officials seeing the programme as part of a larger ecology that includes social, economic and political integration, and social cohesion and national security. This more complex perspective builds in additional criteria on which to judge the programme. This can be seen as making the programme less vulnerable to any one criterion, but also more vulnerable as progress has to be made in meeting a wide range of stakeholder expectations, if the programme is going to continue to produce value for stakeholders. However, as with other stakeholder groups, there were some decision-makers (government officials and politicians) that expressed programme-related concerns pertaining either to student achievement, to the rapid nature of programme expansion, or to insufficient programme expansion.

Two driving forces in building programming are stakeholder inclusion and cooperation. Students, parents, teachers, school managers and decision-maker stakeholders generally expressed to a greater or lesser extent an understanding of the role of other stakeholders in programme development. In particular teachers, school managers and decision-makers recognised the role of other stakeholders in programme development. Teachers and school managers recognised both stakeholders that could be considered internal to the school and those that are external to the school such as the Immersion Centre. They also saw themselves as stakeholders, which implies that

they have taken ownership for the programme, and see themselves as agents capable of effecting change. Although teachers and school managers included students and parents as stakeholders, there was little evidence of that relationship being perceived of as a partnership. However, school managers and decision-makers stressed the value of learning leading to stakeholders becoming more autonomous and taking on more responsibility, whether this is by parents running the Association of Immersion Parents or by teachers, including inexperienced teachers, organising school immersion days. Thus, learning and the sharing of responsibility were seen as drivers for change. Various professional development opportunities were interpreted by school managers and decision-makers as helpful mechanisms in supporting individual and group learning and programme development.

In addition, decision-makers emphasised the value of systematic planning that involves stakeholders, includes frank and open discussion, knowledge-building about immersion practice, and coherence between plans and budgets in the short and long-term. A need for meta-affective awareness and skills, competent and skilful managers who operate out of a sense of mission, and flexible financing were also seen as central to the planning and development process. The perceived interrelated nature of various forces such as autonomy and learning, and mechanisms such as planning instruments and training programmes point to a symbiotic relationship between stakeholders, forces and mechanisms. However, instead of seeking to maintain the *status quo*, these elements appeared on one level to be engaged in a process of reciprocal co-evolution where many stakeholder representatives often valued joint opportunities to learn. However, a process of decline was also evident, for example in the management of the programme by the Immersion Centre. This processes of co-evolution and decline appears to vary over time, and there are numerous indications that not all stakeholder group representatives are operating as an integrated whole. Thus, reciprocal co-evolution is operating selectively leaving significant numbers of people not feeling fully engaged in a common effort led by common beliefs and understandings. This view is reinforced by the discussion in the previous chapter that showed considerable variance in teaching practices and understandings about good pedagogy in immersion.

The important role of the Immersion Centre in fostering programme development was noted by teachers, and in particular, school managers and decision-makers. The Immersion Centre was perceived as a key mechanism in fostering coordinated programme development in training, teaching materials, stakeholder relations, knowledge management and programme management. The networking function that was attributed to the Centre by these three groups of respondents imply that a central node can play an important role in coordinating stakeholder communication and programme development. However, leadership and management provided by the Integration Foundation, its steering committee and changes in leadership of the Immersion Centre or its successor organisation appear to have contributed to a situation, where school managers felt the Immersion Centre's capacity to support schools had declined and needed instead to be reinforced. Despite the perceived decline in the Immersion Centre's leadership/management capacity, programme financing has been maintained, and programming in schools has survived. This suggests that the programme is robust in nature, and that leadership and knowledge and skills are

widely distributed. However, at the same time it appears that a core management problem was allowed to exist for several years, before successful moves were made to resolve it.

A wide range of forces and mechanism were seen as impacting on the immersion programme. Although some mechanisms such as training opportunities, learning materials, effective leaders/managers, and opportunities for stakeholder cooperation were identified by many respondents, some forces and mechanisms were perceived as having a different impact at each of the four schools under study. The obligatory nature of the programme at one school appears to have affected parental and student attitudes to learning through Estonian, whilst making a programme voluntary did not guarantee widespread satisfaction with it. A desire for stability also appears to be a driving force with schools seeking to employ existing staff as immersion teachers. A lack of teamwork in one school does not appear to have affected student achievement, but may nonetheless present some level of risk to the programme. Schools are likely to benefit from receiving differentiated professional development opportunities for teachers, managers and parents. However, it does appear that a wide range of skills and strong leadership and management, combined with stamina, are required to manage various forces influencing programming and to co-construct the mechanisms required for effective programme development. The next and final chapter of the thesis will discuss key conclusions from the literature review and the study and offer models for immersion programme development.

CHAPTER THIRTEEN: CONCLUSION

Epilogue

If the gathering of stakeholders in 2000 to mark the opening of the Immersion Centre and the fact that 134 students in four schools had enrolled in a national Estonian-language immersion programme can be considered a seminal moment in the development of that programme, in 2011 the seminal moment became a seminal month. A *CLIL Month* was launched in the spring of 2011 that included over 100 events organised by Estonian immersion programme stakeholders (Integration Foundation, 2011). This month-long set of events reflects the fact that the early and late immersion programmes had expanded to include over half of the country's Russian-language schools and over 4,500 kindergarten and school students (*ibid.*). It also bears witness to the existence and vitality of an immersion programme network of institutions and stakeholders, and suggests a breadth of messages and experiences to be shared with others. In addition, the immersion programme has incorporated the concept of CLIL. For many programme stakeholders the terms *immersion* and *CLIL* have become synonymous stressing the importance stakeholders are placing on pedagogy, and in particular, the integration of content and language.

The key 2011 *CLIL Month* event was entitled *CLIL as an Enricher of School Culture* (*ibid.*) which implies a programme ethos that seeks to create greater value for students, schools and by extension society at large, as opposed to simply facilitating language learning. Furthermore, the Integration Foundation's new management had made a move towards restoring the Immersion Centre by establishing an Immersion Unit with its own manager. The Integration Foundation's website (2011) recognises the Immersion Unit as distinct from its other departments: 'if other Foundation units deal with integration activities above all through the organisation of competitions and public tenders, the Immersion Unit implements most of its own activities. Thus, its staff can often be found in classrooms rather than in the office behind their desks.' A fundamental tension identified by a PricewaterhouseCoopers report (2005: 5) between the way the Immersion Centre perceived its role and the way the Foundation expected its departments to operate appears to have been resolved with the Centre's successor organisation the Immersion Unit being given increased autonomy and being allowed to have a distinct mandate, mission and work culture.

Introduction

The pedagogical and management complexities of bilingual education have featured prominently in this thesis. However, maintaining a focus on multiple factors influencing bilingual education is both a challenge at the individual and systemic levels. For example, it has been argued in chapters eight and eleven that content teachers in particular, and by implication education systems as a whole, find it difficult to maintain a dual focus on content and language learning. Seeking to foster cross-curricular links, learner autonomy, authentic communication, dialogic learning experiences and learning skills development, whilst maintaining high but realistic expectations for students regarding both content and language learning, are all central to the delivery of quality bilingual education and all present their own significant set of challenges for both teachers and education systems (cf. chapters eight and eleven).

As the complexities of bilingual education are numerous, both individuals and education systems are advised to harness the constructive power of stakeholder cooperation in order to bring solid evidence-based analysis, reasoning and planning to the co-construction of effective bilingual education that serves the needs of a broad range of students and society as a whole. In other words, stakeholders, as it has been argued was the case in Estonia, can build jointly-held and valued capital (a language immersion programme) that serves the interests of society as a whole. To do so, stakeholders need to identify political or economic goals that bilingual education can help achieve (Baker, 2011: 240-241; Klaassen, 2009; Maimets, 2009; Raudne, 2009; Rummo, 2009). In addition, stakeholders need to create well-structured opportunities for joint learning that build professional learning communities which are driven by the higher moral purpose of building effective learning environments and which foster open and frank stakeholder dialogue (Rebane, 2009; Völli, 2009; cf. also chapter nine). This requires that stakeholders navigate conflict constructively, that they consciously work to reduce the presence of pseudo-communities and that they understand and navigate change processes (cf. chapter nine). An integral part of building a professional learning community involves a willingness by its stakeholders to change their understandings, practices and plans, and to share power (*ibid.*).

Although leadership can be distributed and various members of a professional learning community can assume various leadership roles, professional learning communities still require effective leaders at the helm of the given community or organisation (Leithwood *et al.*, 2007: 63). Several Estonian politicians and government officials suggested that the Estonian immersion programme benefited from strong leadership. Maimets (2009) argued that it was the programme managers'/leaders' sense of mission and their knowledge, which was based on research evidence that convinced him to support the programme. Rebane (2009) and Mätlik (2009) suggested that effective leadership by programme managers was characterised by their ability to work with stakeholders, to build common understandings and to make visible what the programme would deliver and later what it had achieved. The thesis argues that instead of using positional power, Estonian immersion programme leaders used moral authority, and that jointly acquired knowledge and understandings were given positional power (cf. chapters two, three and nine). Programme

leaders shared power with other stakeholders, but also had the grounded professional confidence to point out when greater critical thought needed to be brought to the discussion (cf. chapter three). They had also acquired a high level of expertise in the management and delivery of bilingual education (*ibid.*).

In addition to the above, it has been argued that numerous constituent elements of bilingual education combine with external factors influencing bilingual education to operate as an interrelated, dynamic and complex system. Teachers, school managers, education officials and leaders, among other stakeholders in Estonia, were expected to find ways of navigating the large number of interacting factors and elements involved in bilingual education in a manner that avoided cognitive overload or complexity collapse, and instead fostered 'cognitive fluency' (Unkelbach, 2006: 339) and the co-construction of effective learning environments. The thesis submits that the definition of terms and the use of various group decision-making systems (Huxham, 1996: 143) such as results-based management frameworks and a strategic plan supported Estonian stakeholders in deciding how to move forward with the development of immersion programming. Firstly, the frameworks or plans helped to compensate for the fact that human working memory cannot hold at the same time the large number of elements contained in these frameworks. Secondly, definitions and frameworks helped to distil the current state of knowledge and understanding about bilingual education. Once articulated in writing, ideas, planned outcomes, outputs and underlying thinking could be honed through language (Ellis and Robinson, 2008: 3). Thirdly, as plans were created in a manner that gave stakeholders a say in their creation, the plans constituted an agreement regarding what will be achieved and how this will be done. Fourth, as the planning frameworks were made public people were more likely to do what they promised (Thaler and Sunstein, 2008: 70). Stakeholders may have been better placed to see their role in the implementation of the plans. Fifth, it has also been argued that goals motivate both language learners (Gardner, 1985; MacIntyre, 2002) and other programme stakeholders (Thaler and Sunstein, 2008: 70). Finally, weaknesses in plans are also more likely to become apparent if these are made available to public scrutiny, as was the case in Estonia, making it easier to identify and address them. As definitions and planning frameworks support group decision-making, key definitions from chapters six will be proposed again in this conclusion. These will be followed by planning frameworks.

Bilingual education is redefined as an education programme that supports individuals in becoming and remaining bilingual (additive bilingualism). At least two languages are used to teach different content subjects such as Mathematics or History throughout the final if not all the years of school life. Bilingual education supports students in developing:

- age-appropriate levels of L1 competence in reading, writing, speaking and listening
- age-appropriate levels of advanced proficiency in L2 reading, writing, speaking and listening comprehension
- Grade-appropriate levels of academic achievement in non-language school subjects, such as Mathematics and Science taught primarily through the L2 and in those taught primarily through the L1
- an understanding and appreciation of the L1 and L2 cultures

- the capacity for and interest in intercultural communication
- the cognitive and social skills and habits required for success in an ever-changing world.

This redefinition has chosen to integrate one of the main elements of bilingualism – intercultural communication. By clearly stating that bilingual education aims to build in students a capacity for and interest in intercultural communication, this redefinition of bilingual education invites regional and national authorities to include this goal in curricula and in initiatives that support curriculum implementation. In addition, in order to support additive bilingualism that is lifelong, reference is made to the final years of schooling. By establishing such a goal, it is argued that systems can consciously work to avoid situations such as is the case in Canada, which has high attrition rates from early immersion.

CLIL was also redefined in this thesis in order to squarely situate it in the additive bilingual domain, and in order to take into account the interacting nature of language. CLIL is a dual-focused teaching and learning approach in which the L1 and an additional language or two are used for promoting both content mastery and language acquisition to pre-defined levels. This definition is further extended by adding more specific goals namely those in the redefinition of bilingual education proposed above. These goals have the potential of providing additional direction to those developing CLIL programmes.

Finally, this chapter seeks to draw together learning garnered through the development of the Estonian immersion programme, the literature review and from the key themes that emerged from the empirical study, and reprocess these in order to offer two frameworks for navigating these complexities. One of these frameworks is primarily for teaching and learning, and the other primarily for programme development and management. However, the two frameworks are also interrelated; interacting with one another.

Continuum for bilingual education

The *Bilingual education continuum* is primarily a pedagogically-focused framework (cf. Figure 13.1). The continuum depicts a continuous sequence of practices, beliefs⁸³ and assumptions⁸⁴. The opposite ends of the continuum are distinct and in opposition to one another. These are described in detail, but the in-between space and the innumerable number of adjacent elements that sequentially lead to either end of the continuum are left to the imagination. Each practice, belief or assumption can be plotted on the horizontal line indicating which end of the continuum it is leaning towards. On a practical level, the continuum is intended as a ‘group decision support’ framework for structuring stakeholder dialogue about individual and group beliefs, assumptions

⁸³ A belief is defined as an opinion or conviction that an individual holds to be true.

⁸⁴ An assumption is defined as a statement (as a fact, proposition, axiom, postulate, or notion) taken for granted (without investigation) as being true.

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and practices at both the institutional and systemic levels (Huxham, 1996: 143). It is hoped that the act of discussing practices, beliefs, and assumptions, whilst plotting each on the continuum, will support stakeholders in assessing their own and a bilingual programme's current state of development, and discussing where stakeholders would like themselves and the programme to be in the future and how this could be achieved. However, despite distilling experience from diverse countries and contexts, the applicability of the framework remains context dependent, and does not make a claim to universality.

In order to have a reasoned dialogue that leads to a decision to change any given practice in bilingual education, it is helpful to limit the discussion to those key practices that have a significant influence on student learning. For example, as discussed in chapter eight, since cognition and language create one another it is widely agreed that students learning through an L2 need to systematically develop academic language proficiency, over a period of several years so they can hone their thinking about, and capacity to apply, content knowledge. Although language is an object of learning, in education, including bilingual education, language is primarily used as a tool for learning content. Bilingual education is not simply a form of language teaching, but of education in general. Due to the additional challenges of learning through an L2, bilingual education calls for the enhanced use of good pedagogical practices in order to optimally support both content and language learning. Thus, the continuum integrates elements of best practice in education in general with those practices favoured by bilingual education. Furthermore, it has been argued in chapters eight and eleven that decision-making and teaching practices do not operate strictly on a rational plane, but that they are inextricably tied to the affective domain of feelings, beliefs and assumptions. Thus, these affective domain elements are also incorporated into the continuum.

Although seeking to foster cognitive fluency, this continuum constitutes a form of high expectations. High expectations for students and teachers are a characteristic of successful bilingual education (Baker, 2006: 316; Cloud *et al.*, 2000: 10, 12). However, as discussed in chapter eight, researchers have concluded that subject teachers as opposed to class teachers in several nations have difficulty in assuming the dual role of content and language teacher. Similar findings from this study reinforce that view. Thus, if synthesising these two core elements of bilingual education poses a challenge, it can be assumed that synthesising several additional elements is more challenging. When high expectations regarding pedagogy in general and pedagogy specific to learning through an L2 are combined with high expectations regarding meta-cognitive, meta-affective and meta-social skills, which are also argued for in bilingual contexts (Oxford, 2011: 5), the expectations can be seen as higher still. However, expectations must not just be high, they have to be realistic, that is to say attainable.

Both the literature review and this study support the claim that it is possible to create rich L2 learning environments that are characterised both by high expectations regarding content and language learning, and student achievement. For example, in this study, teachers demonstrating high expectations were observed creating rich learning environments characterised by dialogic teaching/learning that encouraged students to think critically and to explain their thinking

processes (cf. chapter 11). These teachers used the students' L2 as the primary medium of instruction resorting to the L1 only briefly in order to facilitate continued learning through the L2. Rich scaffolding was offered. All students were expected to be engaged in learning. These environments were free of sarcasm or criticism, and students and teachers appeared to have a sense of affiliation towards each other. These environments fostered reflection about the learning process and contributed to building learner autonomy. As argued in chapter eight these educational practices are all considered to be effective.

However, in this study, low expectations were evident in a significant percentage of observed lessons. These manifested themselves in teacher statements about students' and/or parents' socio-economic status, and about the difficulty or impossibility of teaching demanding content through the L2. These beliefs suggest a form of 'negative deficit thinking' (Bishop *et al.*, 2010: 28) and a 'fixed mindset' (Dweck, 2006) reflecting a belief that these students are not capable of high achievement. These expressed beliefs correlated, to varying degrees, with impoverished learning environments that lacked rich content and language scaffolding and/or where the use of the L2 was under-exploited. Furthermore, in some of these cases, students were not cognitively challenged and fully engaged in learning. By contrast, these same students were highly engaged in learning through the L2 in lessons where other teachers expected all students to engage actively with challenging content, and classroom discourse was dialogic in nature. This undermines the validity of beliefs about the impossibility of teaching students from disadvantaged backgrounds cognitively challenging content through the L2. Furthermore, teachers' beliefs about the difficulty of low-performing students learning through the L2 and about students with limited L2 knowledge learning challenging content through the L2 could be acting as a barrier to these teachers' own learning and to their engagement in a professional learning community of immersion teachers. Teachers holding such beliefs may not see the point in undergoing additional training in teaching through the L2. In addition, even if these teachers take part in Immersion-Unit-led events, they may act as members of a pseudo-community who do not openly air those differences which run counter to the immersion community's official mainstream public discourse. This invites a management response to support all immersion programme teachers in engaging in open and frank dialogue about learning and in helping all teachers to support all students in learning through the L2.

This also underlines the interacting nature of programme management and pedagogy and of professional learning communities and pseudo-communities. It reinforces the potential value of open and frank talk in stakeholder cooperation and programme development as discussed in chapter nine. However, as also discussed in chapter nine, researchers suggest that frank talk be balanced by constructive and cooperative talk so that trust, the 'connective tissue that binds' individuals together, remains intact (Bryk and Schneider, 2002: 23). In addition, assumptions made by teachers and school managers are likely to influence both programme management and teaching. For example, assuming that a teacher who has successfully taught one grade through the L2 will be able to teach another without additional support or professional development or assuming that someone who speaks the students' L2 as a native language has the skills to teach those students through that language may be incorrect assumptions, as a few lesson observations

in this study demonstrated.

Teacher beliefs and practices as observed during the study did not all neatly fall into categories such as, on the one hand those beliefs and practices which undermine, on the other hand those that support learning. The same can be said about assumptions. As opposed to falling at opposite ends of the continuum, beliefs, assumptions and practices could be located at various points on it. For example, during the study several teachers were observed asking questions that fostered critical thinking, but fact-based questions dominated classroom discourse. In addition, some teachers conducted effective lessons using some ineffective practices such as the overuse of translation. The opposite also occurred. A belief that challenging content could not be learnt through the L2 may have led a teacher to teach through the L1, but that lesson was still effective in supporting student learning of the content. Thus, the continuum is offered as an integrated tool for identifying numerous interacting practices, beliefs and assumptions about pedagogy in general and about pedagogy in bilingual education. This process of identification may serve to facilitate stakeholder dialogue about how to better manage teaching and learning in bilingual education.

A reciprocal co-evolutionary paradigm for the development of bilingual education

The primarily management-focused framework is called a *Reciprocal co-evolutionary paradigm for the development of bilingual education* (cf. Figure 13.2). Reciprocal co-evolution⁸⁵ is defined as a process where stakeholders, their understandings, actions, and the forces they are subject to and influence, and the mechanisms stakeholders produce, all evolve in response to one another and in response to other external stimuli. The paradigm suggests the possibility of the ‘radical relationality’ of complex systems, although it does not assume that such levels of ‘relationality’ always exist in all contexts (Dillon, 2000: 4). In addition, the paradigm suggests the possibility of managing various constituent elements of a complex system so they evolve along a similar evolutionary path that is aimed at the co-construction of effective bilingual programming.

The proposed management paradigm disentangles factors⁸⁶ identified as contributing to the building of successful bilingual education into three broad categories – forces, mechanisms and counterweights. A force belongs to the ideational realm. It is a form of intellectual power, vigour or energy that has the capacity to affect people and events. A force is more than an idea or principle, for ideas and principles do not necessarily lead to any action. However, despite being on some level intangible, these forces have ‘ontological reality’ that is to say they move beyond the denotative to the performative, and are ‘generative-productive’ (Scott, 2010: 98, 46, 5). In this paradigm forces are considered as fuelling or capable of being harnessed to fuel action.

⁸⁵ The concept is commonly used in biology (cf. Ridley: 2004: 640-641) however, is redefined here for bilingual education contexts.

⁸⁶ In this thesis factors are considered entities and quantities that lead to an accomplishment, a result or process.



In contrast to forces, mechanisms are tangible. They belong to the material realm. A mechanism is part of a system that interacts with other parts and leads to something else being done or created. Mechanisms receive their energy from a force or a combination of forces. Thus, despite being created with a causal purpose in mind, mechanisms are not in and of themselves causally efficacious. Finally, there is always a tension among mechanisms, among forces and between the two suggesting that energy within a complex system could benefit from some form of management. Thus, counterweights are offered to support a bilingual education system in maintaining its balance whilst seeking to operate as a co-evolutionary whole.

It has been argued throughout this thesis that a broad range of investments are required to build effective and sustainable immersion programmes. These include investments into: establishing a Centre capable of coordinating programme development; the creation of appropriate learning materials; fostering cooperation among stakeholders; researching student achievement and programme management; managing public relations; creating professional development opportunities for teachers, school managers, trainers, parents, government officials and politicians; and, the construction of results-based and effects-based plans. In addition, the thesis has discussed the value of stakeholders having an in-depth understanding of and skill in using knowledge from a variety of fields directly related to the above such as bilingualism, bilingual education, education in general, and learning materials development, as well as an in-depth understanding of and skills related to many other fields such as planning, change management, public relations, the stakeholder approach and the psychology of decision-making whilst also drawing on knowledge from economics and the neurosciences. This reinforces Fishman's (1976: 24) view that bilingual education is an 'interdisciplinary activity'.

By synthesising and organising the multiple factors discussed in the thesis within a few broad categories the *Reciprocal co-evolutionary paradigm for the development of bilingual education* seeks to facilitate their processing. The paradigm also seeks to point to the knowledge and skill needed for using any given constituent element through other elements within the paradigm. For example, being able to create a user-friendly strategic plan would require stakeholder inclusion, teamwork, a focus on student learning, and the creation of measurable outputs and outcomes which are all factors included elsewhere in the paradigm. In order for the constituent elements of the proposed paradigm to operate as an integrated, constructive and efficient whole, high levels of coherence are required between them. In addition to the paradigm, some illustrations of mechanisms such as a strategic plan and results-based management frameworks are provided in appendices C, H and J.

A co-evolutionary system does not imply that every aspect of a complex system works together in perfect harmony and evolves together at the same pace. Moreover, the paradigm recognises that a co-evolutionary paradigm is embedded and intertwined in a larger ecology that includes potentially negative forces such as 'groupthink' (Janis, 1972: 8-9), 'wilful blindness' (Heffernan, 2010) and 'pseudo-communities' (Grossman *et al.*, 2000). The various forces, mechanisms and counterweights offer a 'group decision support' (Huxham, 1996: 143) framework for bilingual

programme development and thereby a means for building contexts at a systemic level that are favourable for bilingual education. As schools and other organisations are a major part of an education system, the framework/paradigm also has potential implications for the institutional level. It offers stakeholders at the systemic and institutional levels a tool for assessing their own and the bilingual programme's current state of being, and for discussing potential developments. Although it is primarily based on the Estonian experience, Estonian immersion programme stakeholders did seek to distil experience in the field from countries such as Canada, Finland and Spain. Thus, the paradigm represents a partial re-distillation of that learning, and a distillation of learning garnered from the literature review and above all from the empirical study. However, it is primarily a reflection of what occurred in Estonia at a specific period in time, and as such its applicability remains context dependent, and does not make a claim to universality.

Forces

Forces that were central to launching the Estonian immersion programme are depicted at the centre of a box under 'forces' in Figure 13.2. Other forces that were central to on-going programme development surround those in the centre. The remainder of the forces in the outer reaches of the box may appear to be of secondary importance, but not unlike secondary characters in a play, their role is crucial to building a coherent narrative or in this case a successful bilingual programme.

A central force driving the establishment of the Estonian-language immersion programme was a desire for increased national cohesion and security. In addition, stakeholder inclusion was given a prominent position in this thesis. Estonian decision-makers reported that stakeholder inclusion (joint learning and decision-making) helped secure international and national financing, foster the development of stakeholder-supported plans, and drive day-to-day programme implementation. It also fostered stakeholder autonomy and engagement (Käosaar, 2009). This was also the case for the Immersion Centre, which was considered a major force in effective programme development (Saks, 2009). This reinforces earlier research results discussed in chapters eight and nine about the importance of stakeholder inclusion in educational reform and change and the value of a central authority supporting bilingual programming.

Prior to the launch of the Estonian programme several stakeholders and partners suggested that having student participation be voluntary was central to future programme success (Asser, 1999: 29-34; Genesee, 1999: 7-16; Lille, 1999: 35-40; McConnell, 1999: 17-20; Nordgren and Bergström, 1999: 21-28). Swain and Lapkin, 1982:1) had also argued that this was a key characteristic of successful Canadian immersion programmes. Open access to information by way of public annual reports and research reports also drove Estonian stakeholder inclusion (cf. chapter three). This allowed for both positive and negative 'feedback loops' which identified programme strengths and weaknesses and thereby allowed for the stakeholders to take action (Davis and Sumara, 2006: 151). By legitimatising problems and keeping them in the public domain, pseudo-community development was undermined. Furthermore, high expectations for

all were central in getting parents to choose the programme (cf. chapters two and three). However, parent concerns expressed during the study about some school staff not being open to dialogue and the large number of parents who reported not feeling welcome at school or that their opinion is not taken into consideration suggest that schools and those supporting them have work to do in building professional learning communities and in reducing the presence of pseudo-communities (cf. chapter 12). Furthermore, although stakeholder inclusion may have led to an agreement with schools and the Immersion Centre about how many hours and which classes would be taught through Estonian, the study showed that three schools were not fully implementing the agreement (cf. chapter 11 and 12). This suggests a need for stakeholders to renew that agreement and to agree on additional mechanisms for helping schools to implement that renewed agreement. This could help build the moral authority of the Immersion Unit. The moral authority of the Immersion Centre, which in turn was rooted in in-depth knowledge about pedagogy, quality management and respectful human relations, was considered by several stakeholders a major force in building programming (cf. chapter 12).

Although appearing to be relegated to a secondary role in this paradigm, forces such as caring, teamwork, respecting identities and dialogue for partnership all fostered primary forces such as stakeholder inclusion and cooperation and as such indicate that they played a key role (*ibid.*). For example, the majority of teachers, school managers and decision-makers stressed the value of teamwork. Furthermore, stakeholder inclusion and autonomy amplified one another whilst being balanced by learning for all or by various mechanisms such as agreements on values and independent research (cf. chapters two and three). For example, the Immersion Centre may have initially been given considerable autonomy, but it also had a steering committee that approved plans. That committee required draft textbooks, despite having been developed through an extensive consultative process, to be analysed by an expert from Tallinn University. This also suggests that the steering committee had high expectations. However, the Immersion Centre sought yet higher levels of quality by submitting each draft textbook to a rigorous two-day evaluation against previously agreed criteria (cf. chapter three). Similarly, clarity was an important force when used to articulate mechanisms such as measurable outputs and outcomes which were central to obtaining government financing (Mätlik, 2009).

Mechanisms

Forces are insufficient for action. Forces require mechanisms if they are to lead programme development. The Estonian Government's policy prescription to seek EU and NATO membership and to support the integration of the country's non-Estonian-speaking population was a mechanism that underpinned immersion programme development (cf. chapter two). The need to improve language-learning opportunities, was seen by Government as a key vehicle for the integration of non-citizens, and thus, created a favourable context for immersion programme development (*ibid.*). Furthermore, opportunities to learn were central for Estonian stakeholders in convincing them of the merits of immersion (Võlli, 2009). However, learning opportunities moved beyond

learning for the sake of learning. They produced further mechanisms or influenced existing ones. For example, the 1998 seminar, which explored the immersion option with stakeholders, produced a communiqué calling on the Estonian Ministry of Education to launch programme development. Study visits to Canada led to the co-construction of results-based management frameworks and a strategic plan that acted as mechanisms for obtaining programme financing, and for guiding programme implementation and measuring its progress.

The interactive nature of these mechanisms also helped to create momentum which is a force in its own right. For example, letters from Estonian politicians served as a mechanism for gaining support from the Canadian International Development Agency. These sought to build forces such as trust and a belief in the potential of bilingual education for Estonia which in turn laid the groundwork for the development of mechanisms such as project proposals, financing decisions, and international and national agreements regarding programme implementation. In addition, the Immersion Centre and its committed and skilled managers, as well as school managers were considered central by many stakeholders to programme success. Centrally-produced learning materials facilitated teaching and learning. Skilled managers, and learning materials were mechanisms in programme development.

Counterweights

In complex systems there is a ‘decentralisation of control’, ‘internal diversity’, ‘redundancy’, and there are ‘feedback loops’ and plenty of ‘neighbourhood’ or stakeholder interactions (Davis and Sumara, 2006: 138, 142, 143, 147). This suggests that in the complex system of bilingual education no one force or mechanism or group of people has all of the power, answers to questions, or solutions to problems. A complex system is emergent and dynamic. As the various elements of complex systems interact with one another they can be said to counteract one another. Thus, it is unlikely that any one force or mechanism can dominate in a complex system. However, since forces and mechanisms can be powerful they need to be tempered by counterweights to ensure they do not begin to destabilise or damage the system as a whole.

For example, as argued in this thesis, making a decision involves both information or data that are considered as facts and affect (cf. chapter eight). Although research data was an important factor in convincing several Estonian stakeholders in supporting the immersion option, some decision-makers reported being influenced by the sense of mission and commitment of those managing the programme and their attention to the feelings of others. In working with parents, Kāosaar (2010) argued that it was important to create a sense of comfort in them with the idea of immersion by giving them opportunities to meet other parents or by seeking out mainstream discourses with which they could identify.

Equally importantly planning was seen as an important mechanism, but this was counterbalanced by also valuing learning and research. For example, the results based management frameworks

built in an iterative approach by including research and stakeholder meetings, both of which could generate new information and require the framework and other plans to be adapted. Thus, plans allowed for flexibility, with work to meet intended outputs and outcomes taking into account that new data may uncover emergent issues that would need to be addressed. Plans built in opportunities to measure progress in meeting targets and for continued stakeholder dialogue (cf. chapters two and three).

The consequences of a lack of balance between accountability for process and accountability for results created a protracted tension between the Immersion Centre and the Integration Foundation lasting several years and leading to the elimination of the Immersion Centre as an entity (cf. chapter three). However, stakeholder inclusion has helped to redress this imbalance and led the Integration Foundation to create an Immersion Unit with a high level of autonomy.

Concluding remarks

Both the above continuum and paradigm (frameworks) invite the reader to integrate and synthesise such aspects as: good pedagogy in general and good pedagogy in bilingual education; stakeholder perspectives; management and pedagogy; beliefs and practices; forces, mechanisms and counterweights; and content, language and learning skills. The frameworks are driven by an integrative ethos both at and between the institutional and systemic levels. This would suggest that the integrative ethos be reflected throughout the system and taken further than it is possible to do in Figures 13.1 and 13.2. For example, this could involve synthesising a concept from good practice in education such as Vygotsky's (1978: 87) 'zone of proximal development' (ZPD) with a key component of bilingual education such as the integration of content, language and learning skills. In bilingual education, the ZPD becomes the distance between the actual developmental level as determined by an individual's combined processing and application of content and language knowledge, and the level of potential development achievable through the collaborative processing and application of content and language knowledge with (an) adult(s) or peer(s). The ZPD includes the distance between the actual management of one's own learning and the potential level of self-management of learning when working with (an) adult(s) or peer(s).

However, maintaining and consistently applying an integrative ethos would, due to the breadth and depth of knowledge and skill called for in bilingual education, pose a considerable challenge for stakeholders. It is argued that by focusing attention on the various parts of a complex system (teaching/learning practices, beliefs, assumptions, forces, mechanisms, counterweights) and how they interact or influence one another, stakeholders can identify and guide their own learning and programme development. Although not all parts of this complex system will evolve at the same time, stakeholder communication and learning in one part of an interacting system can spur stakeholders working with another part to evolve and develop more effective practices and mechanisms, and to use forces and counterweights more effectively whilst building increased levels of common understanding(s) within the system.

This integrative ethos embodies high expectations. Thus, the thesis argues for stakeholders to develop complexity competence. For teachers in bilingual education, complexity competence is the ability to understand, synthesise, navigate and use in diverse contexts the various features of successful bilingual education programmes in thoughtful ways. This includes the ability to understand and synthesise key aspects of good pedagogy with key features of teaching/learning through an L2, whilst co-constructing authentic and rich learning environments where learners assume considerable responsibility for and develop considerable skill in managing their learning of language, content and learning skills. As actors in a larger ecology teachers also need to be programme advocates who can influence and support stakeholder co-constructed change.

For leaders and managers complexity competence is the ability to understand, synthesise, navigate and use the various features of successful bilingual programmes in diverse contexts in thoughtful ways. This also involves incorporating knowledge and skills from other fields such as change management, planning, communications and psychology and being able to focus on both the macro and micro levels. It also calls for meta-cognitive, meta-affective and meta-social awareness and skills. Central to complexity competence for leaders and managers is the ability to understand, synthesise and navigate the diversity and commonalities inherent in individual views, procedures, organisations and systems at large, while being able to influence and to support stakeholder learning, the building of common narratives and co-constructed change at all those levels.

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February 12, 1999

Marguerite Jackson
Director of Education
Toronto District School Board
155 College Street
Toronto, Ontario
Canada, M5T 1P6

Dear Ms. Jackson,

It is a sincere pleasure to write to you to extend my deep appreciation for the fine reception afforded to the delegation of Estonian educators who were recently in Toronto seeking to learn about the Toronto District School Board's immersion programs.

As a legacy of almost 50 years of Soviet occupation, the newly independent Estonia has a very sizeable immigrant population that does not speak the national language. Immersion is seen as a possible strategy for facilitating language learning and the economic, social and political integration of the country's non-Estonian speaking population.

It is gratifying to see that the relationship, which began between our Ministry and your School Board with the visit to Toronto in 1992 of my predecessor, Rein Loik, has continued to bear fruit.

The delegation which included my Ministry's Secretary General Georg Aher was received by Earl Campbell, Rod Thompson and John Reynolds, as well as by numerous other administrators and educators.

I understand from Georg Aher and other ministry officials that the program organised by your Co-ordinator of Modern Languages Robert McConnell and his very professional team was most useful.

In his letter of thanks to Rod Thompson, Georg Aher wrote that Robert McConnell clearly had heard and understood what the delegation was looking for. It is, indeed, evident that he "had the skill and good relations required for the design and delivery of a first class program, which ran with the effortless ease that only thorough and precise planning can guarantee."

I understand also that the delegation was most impressed by its visits to Toronto schools. They have returned to Estonia with a wealth of new ideas and strategies.

The current series of visits is largely funded by the Canadian International Development Agency (CIDA) through the Ottawa Rotary Club. During a recent meeting held in Ottawa with CIDA President Huguette Labelle and CIDA Vice-President Charles Bassett, I was told that they would welcome a larger project proposal to help Estonia actually do the detailed planning and foundation work required to establish a national Estonian language immersion program.

We in Estonia have a longstanding relationship with CIDA which has helped fund several substantial projects. Among them is a major project with the Ontario Ministry of Education and Training which has worked with our State Chancellery to develop a Translation and Legislative Support Centre. This Estonian and CIDA-funded initiative is often cited by Ontario and Estonian officials as a model for project development and implementation, as well as an example of the mutually beneficial nature of international projects.

Based on our previous co-operation with the Toronto District School Board and your Board's considerable expertise in the field of immersion, we would be interested in working directly with the Toronto District School Board on an immersion-centred project proposal for submission to CIDA. I would look forward to beginning a dialogue with your Board on this matter.

Once again, thank you for the fine reception afforded to the Estonian delegation by the Toronto District School Board.

Sincerely yours,

Mait Klaassen
Minister

cc: Earl Campbell, Toronto District School Board
Rod Thompson, Toronto District School Board
John Reynolds, Toronto District School Board
Juri Wallner, Rotary Club of Ottawa
Peeter Mehisto, Rotary Club of Ottawa

QUESTIONS OF INTEREST TO THE ESTONIAN DELEGATION 11-19 JANUARY 1999 TORONTO STUDY VISIT

CANADIAN EDUCATION SYSTEM

- Who reports to whom? (an overview of the educational system, its organisational structure)
- What are the responsibilities of each level? (federal government, province, ministry, city, school board)
- How does one level report to the other?
- How do the various levels work together?

QUESTIONS FOR SCHOOL BOARD

Organisational Set-up

- A rapid review of the organisational chart
- What is the School Board's mission?
- How many schools does the Board manage?
- What types of schools does the Board have?
- What special programmes does the Board offer?
- Who reports to whom on immersion?
- How many positions have been allocated at the Board level to support the programme and what sort of support is provided?
- What is the role of the language coordinators?
- How many people report to the coordinator and what is their role?

Foundations

- How and based on what principles are immersion schools established?
- How and based on which principles are principals chosen?
- Do parents have a right to place their children into immersion programmes? If not, how is admission to these programmes organised?
- What has the Board gained from offering immersion programmes?
- What have students and society gained from the Board's immersion programmes?
- How does the Board get feedback on the programmes?

Financing

- How does the Board ensure the steady financing of immersion programmes?
- How does the financing of immersion programmes differ from the financing of regular programmes?
- Do immersion programmes receive any special provincial or national funding?
- What new budget lines or extra funding does an immersion school require?
- How much more expensive is it to maintain an immersion school than a regular school?

Inter-school Cooperation

- How does the Board support inter-school cooperation?
- How do regular and immersion schools cooperate?

Evaluation

- How does the Board get feedback on the immersion programme?
- How are immersion schools evaluated?
- How and based on what criteria are the principals of immersion schools evaluated?
- What is the dropout rate during the programme?
- How are students who drop out of immersion helped to integrate with the English-language programme?

Research

- To what extent does the Board take into account research findings?
- Does the Board fund research?

Public Relations/Parents

- Does the Board play a role in public relations matters regarding immersion?
If yes, how?
- How does the Board elicit parental opinion?
- How do parents communicate with the Board?
- What are the primary concerns of parents?

QUESTIONS FOR PRINCIPALS

- Who reports to whom in the kindergarten? (organisational chart)
- How are staff and parental opinions and wishes heard and taken into account?
- How does a principal evaluate the immersion programme?
- How does a principal get feedback on his/her own actions and behaviour?
- How does a principal contribute to the exchange of information and skills among teachers?
- How else does a principal contribute to the professional development of his/her staff?
- How does a principal motivate staff?
- What are the planning implications of introducing an immersion programme?
- How does the management of an immersion school differ from the management of a regular school?
- What qualifications, skills and personal characteristics are considered vital to the management of an immersion school?
- Do the principals of immersion schools receive any special training?
- How and to what extent does a principal work in concert with the parents of his/her students?
- What is done to support a child who is having difficulty in the programme?
What is the dropout rate?

QUESTIONS FOR TEACHERS

- By whom and how are teaching materials prepared?
- How do textbooks and other teaching materials in immersion differ from those used in schools for native-speakers of French?
- What are the biggest problems teachers in this school have faced at the start of the school year?
- What are the most important things that teachers in the immersion programme have to keep in mind?
- What are the most essential things an immersion teacher must keep in mind?
- How do students upon their initial arrival at school react to the fact that their teacher is speaking a foreign language?
- How and how often do teachers speak with parents?
- What pre-service training have teachers received? What in-service training do teachers receive?
- What has been the most useful training? What training is still needed?

QUESTIONS FOR PARENTS OF STUDENTS

- Why did you place your child in an immersion programme?
- Do you speak French? If yes, do you speak with your child in French?
- How do you help your child do school work?
- What problems or challenges has your child faced in the immersion programme? How have the problems been solved or the challenges met?
- How do you communicate and work with the principal and/or teachers?
- Are you a member of Canadian Parents for French?

QUESTIONS FOR MINISTRY OF EDUCATION

- What role does the Ministry play in managing immersion programmes?
- Is there a legislative framework that regulates immersion programmes?
- How is immersion policy established?
- Which laws, curriculum documents, standards, etc. do immersion schools have to abide by?
- How does the Ministry ensure the quality of immersion programmes?
- How does the Ministry get feedback from students and parents?

QUESTIONS FOR THE PRINCIPAL OF A FRENCH-LANGUAGE SCHOOL

- Which policies, laws and regulations protect French-language schools in Ontario?
- How are children admitted to these schools? Who is not admitted?
- How are children helped to preserve their French identity, their culture?
- How do the neighbourhood English speaking students relate to your French speaking students?
- What is the dropout rate? Do your graduates continue their studies in French?
- How are students with weak French skills supported?





VABARIIGI VALITSUS
THE GOVERNMENT OF THE REPUBLIC OF ESTONIA
MINISTER

Mr. Charles Bassett
 Vice-President
 Central and Eastern European Branch
 Canadian International Development Agency Meie 24.10.99 nr 7-3/8484
 200 Promenade du Portage
 Hull, Quebec
 Canada, K1A 0G4

Cc: Ms Marina Asari
 Office of the Canadian Embassy
 Toom-Kooli 13 II floor
 Tallinn
 Estonia

Dear Mr. Bassett,

Over the past few months, I have watched with great interest the development of the Estonian language immersion project. I have also had occasion to meet with several of the proposed project's participants, including representatives of the Toronto District School Board (TDSB). A member of my staff is on the Steering Committee for the project. Also, I have reviewed the TDSB-Estonian Ministry of Education project proposal.

The project promises to make a major contribution to the integration of young non-Estonians into the mainstream of Estonia's economic, political and cultural life. Knowledge of the official language is one of the primary vehicles for integration. Of equal importance, immersion has the added benefit of allowing minority students to maintain their mother tongue and cultural identity.

Integration is a key priority of the Estonian Government. Despite being in a period of sizeable budgetary cutbacks, special funds are being allotted to integration projects. The City of Narva will be among those establishing an Estonian language immersion school within the framework of the proposed immersion project. Taking into account the importance of this project and the special needs of the City of Narva, our Government has slated 7.5 million Estonian crowns to assist the city in refitting the proposed immersion school.

The challenges of establishing a national Estonian language immersion programme are so formidable that we feel it would be wise to work in co-operation with Canada. Canadian expertise in the field is undeniable. We have in place a fine team of people

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both in Canada and Estonia who have proven over the last year that they can work together. The project proposal addresses those key areas where support is needed to establish our national programme. CIDA's support of our efforts would be most welcome and help to ensure a successful launch of a very important new programme.

Thank you for giving this request your due consideration.

Sincerely,

A handwritten signature in black ink, appearing to read 'K. Saks', written in a cursive style.

Katrin Saks
Minister



EESTI VABARIIGI HARIDUSMINISTEERIUM • ESTONIAN MINISTRY OF EDUCATION

Dr. Huguette Labelle
 President
 Canadian International Development Agency
 200 Promenade du Portage
 Hull, Quebec
 Canada, K1A 0G4

September 22, 1999

Dear Dr. Labelle,

Careful analysis and planning by my Ministry, a broad range of potential local project stakeholders and by the Toronto District School Board (TDSB) have helped to lay a very solid foundation for the proposed National Estonian Language Immersion Project. Potential partners have analysed needs and capacity, defined outcomes, decided on how success will be measured and, above all, learned how best to work together in the name of a common goal.

The task of establishing a national Estonian language immersion programme is mammoth. Estonia is a small country with limited human and material resources. Moreover, the need for improved language training is so pressing that we can ill afford to experiment or reinvent the wheel. We have a great deal to learn from the Canadian experience with immersion. Consequently, the TDSB's proposal to work in partnership with my Ministry and CIDA is most welcome.

The scope and focus of the TDSB's proposal is realistic and sober. The proposed support from CIDA and the TDSB should allow for the establishment of an efficient and effective Estonian language programme that in a few short years will become an ongoing part of the Estonian educational system. The judicious use of resources foreseen in the proposed joint budget would not only lay the required groundwork for the establishment and future expansion of the programme, but would ensure that Estonia is able to continue to fund the programme after the Canadian disengagement.

My Ministry wholeheartedly endorses the TDSB's project proposal. CIDA's support to this project would prove invaluable in our efforts to improve Estonian language teaching and to increase opportunities for the integration of young non-Estonians into Estonian society.

Sincerely yours,

Tõnis Lukas
 Minister

cc: Toronto District School Board

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October 11, 1999

Mr. Charles Bassett
Vice-President
Central and Eastern Europe Branch
Canadian International Development Agency
200 Promenade du Portage
Hull, Quebec
Canada, K1A 0G4

Dear Mr. Bassett,

It is both an honour and a pleasure to write to you in order to lend my support and that of the Estonian Parliamentary Committee for Culture to the Toronto District School Board's and the Estonian Ministry of Education's proposal to establish a national network of Estonian language immersion schools. The process leading to the proposal has been a model of project development. It has led key stakeholders to develop a detailed proposal that addresses pressing needs in a realistic and well thought-through manner.

As you know, Estonia is working hard to integrate its minorities who constitute approximately one-third of our population. The challenge of integrating such a sizeable number of people in one nation is almost unparalleled in history and would likely prove to be a significant challenge for even the wealthiest of nations. Consequently, in the current Estonian climate of extreme fiscal restraint and cutbacks, Canada's willingness to support our integration efforts is particularly welcome and holds the promise of making a very important and unique contribution.

Canada is the world leader in immersion. In Estonia, language knowledge is a prerequisite to integration, and immersion is generally accepted as the most effective language teaching method in existence. Although the immersion model has been successfully implemented in other nations, there have also been cases where a lack of planning, detailed knowledge about the methodology and commitment by stakeholders have resulted in a failure to develop a proper programme.

In Estonia, the commitment to immersion has been demonstrated over the last year through the steadfast involvement of all key stakeholders in the project development process. Estonia has also allotted significant material resources to this process. Planning has been most thorough, as illustrated by the Estonian Ministry of Education's Results Based Management Framework document, which has affectionately become known as the RBM Tablecloth.

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Canadian expertise will be crucial if we are to understand immersion methodology thoroughly and if we are to prepare our teachers and administrators to implement the programme. The planned teachers' and administrators' handbook/compendium will help systematise and record essential knowledge, training will help apply it and planned teaching materials together with the requisite teachers' guides will help educators to implement the programme and students to learn successfully.

A particularly attractive feature of immersion is that it is also affordable. After meeting the challenges of initial start-up, immersion programmes become an integral part of a school system and require little additional funding.

The project has my full support, and it would be a pleasure to continue to work with what has become known as a very professional international team as it prepares to help Estonia take a quantum leap forward in offering improved Estonian language learning opportunities to young minority students.

Thank you for considering this proposal.

Sincerely yours,

A handwritten signature in black ink, appearing to read 'Mart Meri', with a long horizontal flourish extending to the right.

Mart Meri
Chair
Parliamentary Committee for Culture

School selection criteria for the Estonian Language Immersion Programme

- be a Russian-medium state or municipal school;
- have a head teacher that speaks Estonian at a B-level¹;
- have an agreement with qualified teachers to teach in the immersion programme;
- have enough children to open both an immersion and a non-immersion stream;
- have a deputy headteacher, a teacher-methodologist or/and senior teacher who speak Estonian and understand Estonian as-a-second-language methodology;
- have a strategic plan and curriculum that reflect a move toward a step-by-step expanding of teaching through Estonian;
- have the agreement of its owner and a letter stating that the owner supports the launch of immersion classes;
- have experience with in-service training;
- (in schools with two shifts), have the immersion classes run during the morning shift;
- have appropriate classrooms and furniture;
- the school management that is aware of the basic principles of immersion;
- be prepared:
 - to raise awareness about immersion in the school and community;
 - for teamwork within the entire school;
 - to make changes in staffing;
 - for having school managers (head teachers/ deputy heads) and teachers participate in in-service training;
 - to have teachers and school managers to be absent from school for study visits;
 - to communicate with potential partners;
 - share experience with immersion and other schools

Immersion Centre

¹ See Common European Framework of References for Languages, Council of Europe.

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CRITERIA FOR PRODUCING TEXTBOOKS AND OTHER TEACHING MATERIALS

I. INTRODUCTION/GENERAL PRINCIPLES

Textbooks are to be written in adherence with the given subject-area content and objectives of the national curriculum, and in harmony with general educational goals.

Textbooks are drafted for a specific grade level, subject/subjects or course/courses, and are normally the primary teaching material. Nonetheless, textbooks should integrate topics and vocabulary from various subject areas to help provide a multifaceted and integrated educational experience.

Emphasis in grade one is on integrated textbooks. From grade two on, textbooks are more subject specific. A subject is to be developed systematically throughout one textbook and should address a specific group of students. Textbooks are to be geared towards the students, not the teacher, and should be based on the students' experiences. Teaching materials are meant to support teachers, not restrict them. Each teacher determines how and to what extent a textbook will be used.

All textbooks must progressively develop the students' language skills so that they are able to comprehend, systematise, appreciate and contemplate facts and experiences, and are able to effectively communicate their own knowledge and opinions in speech and in writing.

Textbooks should do more than just communicate information. They should promote critical and creative thought. At the same time, textbooks must help students recognise the limits of their own thinking and promote mutual understanding in social situations in order to contribute to problem-solving.

Textbooks should incite a desire to learn so children will know/sense when to doubt, ask questions and when they need additional information. Ideally, a textbook will help students find and process information, and help them to generate and evaluate alternatives for solving everyday problems in the family and society. Textbooks should help students relate new information to existing knowledge.

Textbooks must encourage the development of sympathetic, fair and honest people so that students can make a positive contribution to society, both as individuals and as a group. Teaching materials should encourage students to treat others with respect, and promote behaviour that reflects an educated, rational and active sense of responsibility.

Textbooks should encourage students to use information to their benefit, to look for creative solutions, to experiment, and should provide the opportunity for students to evaluate their own performance. Follow-up exercises should support the educational process and encourage students to engage in independent study.

Content and illustrations should avoid bias and stereotypes which incite gender, ethnic, cultural or racial prejudice. In order to avoid such stereotypes, references to different professions, social strata and economic circumstances must be chosen with care.

It is important that a textbook help students to understand their role in the family and society. A textbook should progressively promote a student's sense of belonging as a citizen of Estonia, Europe and the world.

II. TECHNICAL REQUIREMENTS

1. Teaching materials must conform to the technical requirements set by the Ministry of Education, including that they must be large enough for a child to hold comfortably.
2. No emphasis is to be marked on syllables.
3. Textbooks should not contain glossaries. Instead they should include a list of vocabulary, a list of synonyms, etc.
4. Block letters (A,B,C) should be used for the first half of the year in grade one.
5. Normal printed letters (a, b, c) should be used starting from the second half of the year in grade one.
6. Arts styles and colours on facing pages should not conflict.
7. Coloured areas and font should be large enough to ensure that they will be registered in the printing process. Artists are to be advised not to use fluorescent inks, since they cannot be reproduced accurately.

III. ENVIRONMENTAL ISSUES

1. Transportation should be shown such that attention is drawn to sustainable use of the environment. Public transportation should be depicted instead of large cars, especially with only one occupant.
2. People should also be shown walking or riding a bicycle to reach their destinations. This should be depicted as not only enjoyable but as a great way to conserve energy.
3. People and groups of people should be depicted in situations which reflect an average standard of living. Subject matter and illustrations should avoid focusing on things which suggest great wealth (luxury yachts, private jets, expensive jewellery).
4. Not only should consideration be given to the general level of technological development, but every effort should be made to take into account projected trends such the ever-increasing use of the Internet and other communications technology.
5. The environment and human activity shown should demonstrate respect for plants as living things regardless of whether they are cultivated or growing in the wild, as well as protection of domestic and wild animals. Regulations regarding endangered species must be kept in mind.
6. Urban, suburban or rural life should not be idealized or glamorized, and a balance of different settings should be used.

7. When depicting urban areas, special attention should be paid to presenting them as healthy, people-friendly environments for both children and adults.
8. Where appropriate, text and illustrations should reflect the growing emphasis on reducing consumption, reuse and recycling.

IV. SOCIAL ISSUES

A. *THE ELDERLY*

1. Elderly women and men should be shown to reflect dignity and wellness. They should not be arbitrarily depicted in unfashionable clothing.
2. Middle-aged and elderly persons should be depicted together with younger generations. Groups of people should be made up of people of different ages.
3. Do not allow stereotypes such as grey hair, buns, canes, wire-rimmed glasses and rocking chairs to dominate.
4. Elderly persons should be depicted as involved in many activities which are beneficial to society and their own positive self-image.

B. *THE PHYSICALLY CHALLENGED*

1. Physically challenged persons should be depicted as part of the group involved in the mainstream of events, and subject matter should include their lifestyles and achievements. They should also be seen in a leadership role.
2. Physically challenged children and adults should be depicted in various environments and interacting with other people.
3. The ability of the physically challenged to cope with everyday life and to adapt to the environment should be shown. This will draw attention to their special needs, such as those of people in wheelchairs.

C. *MINORITIES*

1. Photographs and illustrations should convey the ethnic diversity of the country.
2. Minorities should be depicted as having social status equal to that of the majority.
3. The names and personalities of characters should reflect a diversity of cultures and social tolerance.
4. Illustrators should bear in mind that not all members of an ethnic group look alike, but rather that physical characteristics vary widely. Portraits of any ethnic group, be it Koreans, Georgians, Azerbaijanis, Uzbeks or Tartars, should be realistic and recognisable.
5. Exaggerations, which often lead to distortion of physical characteristics, should be avoided. Distinctive physical features such as the eyes of Asiatics should be depicted realistically.

6. Illustrations should promote a positive self-image for people of all ages and ethnic groups. Leadership roles in various activities and professions should be divided equally among members of different ethnic groups.
7. When depicting skin colour, artists should make sure that the skin colour is the same once printed, and that it is the same each time for characters that are used repeatedly. Skin tone may vary among members of the same family.
8. Skin tone may be omitted from black and white illustrations if the distinctive features of the ethnic group can be depicted in some other way.
9. Hairstyles should be realistic and not too trendy or offensive.
10. Reference to stereotypes regarding social and economic circumstances in the past should be avoided, unless they are portrayed in an historical context.
11. The cultural contribution and distinctive lifestyles of ethnic groups (such as nomadic gypsies) should be depicted in a positive, culturally tolerant way.

D. GENDER EQUALITY

1. Teaching materials should portray a balance of men/boys and women/girls in active roles and different age groups. A ratio of 50:50 should be adhered to in both content and illustrations.
2. Both sexes should be depicted as being engaged in independent activities as well as leadership roles.
3. Both sexes should be depicted equally in domestic situations, doing household chores and caring for children. The opportunity to portray single parents in a positive light should not be overlooked.
4. In portraying groups, illustrators should bear in mind that some women are taller than some men.
5. Women should be shown to be as capable of making decisions and as mentally strong as men so that they can serve as role-models for children. At the same time, men should sometimes be shown as caregivers and protectors. The text and illustrations should recognise the contribution of working women and stay-home fathers.
6. Avoid words that specify the gender of a person. Use "chairperson" not "chairman", "flight attendant" not "stewardess", "actor" not "actress", "mail carrier" not "mailman".
7. When depicting children at play, do not show boys playing only with traditionally "boy's toys" and girls playing only with traditionally "girl's toys".
8. Childhood stereotypes should be avoided: tomboys, sissies, wall flowers, etc.
9. Authors and illustrators should bear in mind that people of both sexes experience a wide range of emotions: fear, terror, anxiety, anger, sorrow, affection, boldness, gentleness, tenderness.
10. True friendship between people of different sexes should be depicted.
11. Women, regardless of race, should be shown to be involved in the mainstream of events and endeavours, regardless of whether the action is placed in the past

or the present. They should not be shown as mere observers or only from a male perspective.

E. GENERAL SOCIAL CONCERNS

1. Clothing should be appropriate for the situation and activity depicted.
2. Illustrations are relevant for a longer time if they avoid depicting trends, even if the trends are widespread.
3. All women who are cooking or cleaning should not necessarily be shown wearing an apron, although an apron may sometimes be appropriate.
4. Clothing and jewellery made of leopard skin, ivory and other endangered species should not be shown.
5. Violence and weapons must not be depicted in any manner. If a text contains violent episodes, an illustration of the text should not focus on them.
6. Avoid excessive depictions of flags.
7. Photos depicting famous persons must be complimentary and should not display the author's personal opinion. Avoid the use of out-dated photos of contemporary persons and the depiction of "flash in the pan" celebrities.
8. The dignity and importance of an honest career in the service industry, trade, business or any other area should be reflected in both the text and illustrations.
9. Discussions and illustrations dealing with religion or churches should include all major religious groups. Opinions about religion, especially negatives ones, should be avoided.
10. References in the text or illustrations to satanic rituals or black magic should not be made.

V. ILLUSTRATION CRITERIA

A. PEOPLE

1. Foreshortening: distorting perspectives can be used as a theatrical device to better convey the events and mood in an illustration. The illustrator must take care to ensure that the illustration is comprehensible and unambiguous.
2. Grotesqueries: characterisations of distinctive facial features to emphasise individuality (big nose, big ears, buckteeth, big lips) should be avoided. Facial features must be depicted clearly and accurately.
3. Exaggerated perspectives that show people grotesquely should be avoided.

B. ENVIRONMENTS

1. Living environments and backgrounds should reflect the diversity of architecture in the country's different regions.
2. Illustrations should depict different types of well-maintained housing and avoid depicting extreme wealth or extreme poverty.

3. Illustrations should depict a variety of building types: apartment buildings, townhouses, single family houses and skyscrapers.
4. Where feasible, both urban and rural settings should be used as a background.
5. Where appropriate, a variety of public buildings should be shown.
6. Telephone numbers shown in illustrations should begin with the numbers 555 or some other combination of numbers which is not in use.

C. TABOOS IN ART

1. Anatomical inaccuracies should be avoided. The eyes of Asians must not be drawn as slits with one diagonal line. Eyes and eyelids must be accurately drawn.
2. Trademarks and other details which may serve as advertising for a particular product should be avoided.
3. Artists should not depict smoking or the consumption of alcohol or narcotics, or any object that suggests their use.
4. Illustrations should not depict so-called "junk food" such as popcorn, candy, French fries and other non-nutritious foods.
5. Violence against people or animals should not be shown. Accidental injury may be shown if this cannot be avoided due to the subject matter; however, the depiction should not be graphic.
6. Comical situations and farces should avoid cruelty or violence towards any of the characters.
7. Graffiti should not be depicted unless it is clearly tied to a lesson to be learned.

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STUDENT QUESTIONNAIRE

Dear students,

This questionnaire is part of a larger study of the immersion programme. Parents, teachers and school managers are also being surveyed.

This research project is funded by the Ministry of Education and Research. It is hoped that your feedback and that of the other participants will contribute to improving the quality of immersion programming.

This research project includes all four schools that began offering late immersion programming in 2003. All student in immersion classes in Grades 8 and 9 will be asked to fill out this questionnaire.

Your participation is strictly voluntary. You do not have to fill out the questionnaire or answer all the questions in it, however, please take into account that your feedback can help the Ministry and schools improve the quality of immersion programming.

Please do not write your name on the questionnaire. In that way, no one will be able to identify who answered what. The questionnaires will only be seen by the researchers.

A summary of the research study will be presented to you, your teachers and your parents before the end of the school year.

This questionnaire has been approved by the Estonian Association of Immersion Parents.

Thank you for taking time to fill out the questionnaire!

Peeter Mehisto
PhD student
Institute of Education
University of London
peeter.mehisto@gmail.com

Student background information

Age : _____ Grade: _____ Sex: _____ (*boy or girl*)

1. Why are you studying in the immersion programme?

(Please rate each statements importance using an 'X' in the appropriate square.)

Statements		I disagree	I somewhat disagree	I somewhat agree	I agree
a	I think it will help me get a good job.				
b	I am interested in Estonians and their way of life.				
c	It will allow me to get to know more people.				
d	People living in Estonia should speak Estonian.				
e	I enjoy it.				
f	It will prepare me to study in an Estonian-language college or university.				
g	My parents made me do it.				
h	Other (Please specify.)				

2. If you were asked to judge whether a class is good or not, how much importance would you attach to the following considerations? For each statement below, circle the number which best matches how you feel (1 = unimportant; 5 = very important).

Statements		unimportant 1	2	somewhat important 3	4	very important 5
a	How useful the subject is in preparing me for further education	1	2	3	4	5
b	How useful it will be in helping me get a job	1	2	3	4	5
c	How much fun the class is	1	2	3	4	5
d	How good the teacher is	1	2	3	4	5
e	How much homework I get	1	2	3	4	5
f	How good my marks are	1	2	3	4	5
g	How satisfying the work is	1	2	3	4	5
h	How much variety there is	1	2	3	4	5

i	How interesting it is	1	2	3	4	5
j	How much fun it is	1	2	3	4	5
k	How much I can speak with friends	1	2	3	4	5
l	Other (please specify)	1	2	3	4	5

3. Name any Estonian cities, towns and/or regions you have visited.

.....

.....

4. What did you like the most about any or all of these visits and why?

.....

.....

5. What did you like the least?

.....

.....

6. What Estonian city town or region would you like to visit again and why?

.....

.....

7. Please complete the following statements by using one or more words.

I think Estonians are

I think Russians are

8. Please check one box.

After basic compulsory school, I intend:

☐ a) to go to an Estonian-language high school.

☐ b) to go to a Russian-language school offering Estonian immersion.

- ☐ c) to go to vocational school.
- ☐ d) to leave school and get a job.

9. If you could change one thing about the way your Science teacher teaches, what would it be?

.....

.....

10. If you could change one thing about the way your Estonian teacher teaches, what would it be?

.....

.....

11. If you could change one thing about the way your History teacher teaches, what would it be?

.....

.....

12. If you could change one thing about the way your Mathematics teacher teaches, what would it be?

.....

.....

13. How much Estonian does your mother know? Circle a number on the scale to indicate what you think.

None		Some		Lots
1	2	3	4	5

14. How much does your father know?

None		Some		Lots
1	2	3	4	5

15. How much do your parents encourage you to learn Estonian?

Not at all		A little		Very much
1	2	3	4	5

16. With whom do you speak Estonian outside of school? Check off those that apply to you.

- ☐ a) Estonian young people
☐ b) Russian friends
☐ c) store clerks
☐ d) post office workers
☐ e) neighbours
☐ f) (sports) training partners
☐ g) others

17. How many times per month do you speak Estonian outside of school? Please circle one answer.

0-1 time 2-3 times 4-5 times 5-10 times almost every day

18. How much do you enjoy the following activities in your **Science** class? Please also indicate the language or languages of instruction used in that class.

- ☐ a) Estonian
☐ b) Russian
☐ c) Estonian with a little Russian
☐ d) Estonian with lots of Russian

Activities		I do not like this at all		I don't mind this		I enjoy this	We don't do this in class.
		1	2	3	4	5	N
a	group work	1	2	3	4	5	N
b	pair work	1	2	3	4	5	N
c	listening exercises	1	2	3	4	5	N
d	reading quietly	1	2	3	4	5	N
e	reading out loud one student at a time	1	2	3	4	5	N
f	speaking	1	2	3	4	5	N
g	writing exercises	1	2	3	4	5	N
h	projects	1	2	3	4	5	N
i	projects involving several teachers classes	1	2	3	4	5	N
j	excursions	1	2	3	4	5	N
k	planning learning goals	1	2	3	4	5	N
l	analysing how we are making progress toward learning goals	1	2	3	4	5	N
m	one-on-one meetings with my teacher	1	2	3	4	5	N
n	contact with Estonian speakers	1	2	3	4	5	N
o	computer work	1	2	3	4	5	N
p	working in the library	1	2	3	4	5	N

q	experiments	1	2	3	4	5	N
r	using learning materials such as Estonian language newspapers, the Internet, blogs, TV or radio broadcasts	1	2	3	4	5	N

19. How much do you enjoy the following activities in **History** class? Please also indicate the language or languages of instruction in that class.

- ☐ a) Estonian
☐ b) Russian
☐ c) Estonian with a little Russian
☐ d) Estonian with lots of Russian

Activities		I do not like this at all		I don't mind this		I enjoy this	We don't do this in class.
		1	2	3	4	5	N
a	group work	1	2	3	4	5	N
b	pair work	1	2	3	4	5	N
c	listening exercises	1	2	3	4	5	N
d	reading quietly	1	2	3	4	5	N
e	reading out loud one student at a time	1	2	3	4	5	N
f	speaking	1	2	3	4	5	N
g	writing exercises	1	2	3	4	5	N
h	projects	1	2	3	4	5	N
i	projects involving several teachers classes	1	2	3	4	5	N
j	excursions	1	2	3	4	5	N
k	planning learning goals	1	2	3	4	5	N
l	analysing how we are making progress toward learning goals	1	2	3	4	5	N
m	one-on-one meetings with my teacher	1	2	3	4	5	N
n	contact with Estonian speakers	1	2	3	4	5	N
o	computer work	1	2	3	4	5	N
p	working in the library	1	2	3	4	5	N
q	experiments	1	2	3	4	5	N
r	using learning materials such as Estonian language newspapers, the Internet, blogs, TV or radio broadcasts	1	2	3	4	5	N

20. How much do you enjoy the following activities in your **Estonian** classes? Please also indicate the language or languages of instruction in that class.

- ☐ a) Estonian
☐ b) Russian
☐ c) Estonian with a little Russian
☐ d) Estonian with lots of Russian

Activities		I do not like this at all		I don't mind this		I enjoy this	We don't do this in class.
		1	2	3	4	5	N
a	group work	1	2	3	4	5	N
b	pair work	1	2	3	4	5	N
c	listening exercises	1	2	3	4	5	N
d	reading quietly	1	2	3	4	5	N
e	reading out loud one student at a time	1	2	3	4	5	N
f	speaking	1	2	3	4	5	N
g	writing exercises	1	2	3	4	5	N
h	projects	1	2	3	4	5	N
i	projects involving several teachers classes	1	2	3	4	5	N
j	excursions	1	2	3	4	5	N
k	planning learning goals	1	2	3	4	5	N
l	analysing how we are making progress toward learning goals	1	2	3	4	5	N
m	one-on-one meetings with my teacher	1	2	3	4	5	N
n	contact with Estonian speakers	1	2	3	4	5	N
o	computer work	1	2	3	4	5	N
p	working in the library	1	2	3	4	5	N
q	experiments	1	2	3	4	5	N
r	using learning materials such as Estonian language newspapers, the Internet, blogs, TV or radio broadcasts	1	2	3	4	5	N

21. How much do you enjoy the following activities in your **Biology** class? Please indicate the language or languages of instruction.

- ☐ a) Estonian
☐ b) Russian
☐ c) Estonian with a little Russian
☐ d) Estonian with lots of Russian

Statements		I do not like this at all		I don't mind this		I enjoy this	We don't do this in class.
		1	2	3	4	5	N
a	group work	1	2	3	4	5	N
b	pair work	1	2	3	4	5	N
c	listening exercises	1	2	3	4	5	N
d	reading quietly	1	2	3	4	5	N
e	reading out loud one student at a time	1	2	3	4	5	N
f	speaking	1	2	3	4	5	N
g	writing exercises	1	2	3	4	5	N
h	projects	1	2	3	4	5	N
i	projects involving several teachers classes	1	2	3	4	5	N
j	excursions	1	2	3	4	5	N
k	planning learning goals	1	2	3	4	5	N
l	analysing how we are making progress toward learning goals	1	2	3	4	5	N
m	one-on-one meetings with my teacher	1	2	3	4	5	N
n	contact with Estonian speakers	1	2	3	4	5	N
o	computer work	1	2	3	4	5	N
p	working in the library	1	2	3	4	5	N
q	experiments	1	2	3	4	5	N
r	using learning materials such as Estonian language newspapers, the Internet, blogs, TV or radio broadcasts	1	2	3	4	5	N

22. Studying subjects through Estonian is:

- ☐ a) too hard
☐ b) challenging, but I can cope
☐ c) easy

23. What do your friends who are **not** in immersion think about it? Check the appropriate answer or answers.

- ☐ a) Immersion is cool.
☐ b) Immersion is for smart people.
☐ c) They wish they were in immersion.
☐ d) They think immersion is hard.
☐ e) Other (Please specify.)

24. Please check the statement which applies best to you.

- ☐ I am making excellent progress in Estonian.
- ☐ I am making satisfactory progress in Estonian.
- ☐ I am making poor progress in Estonian.

25. What does your Estonian teacher think?

- ☐ S/he thinks I am making excellent progress in Estonian.
- ☐ S/he thinks I am making satisfactory progress in Estonian.
- ☐ S/he thinks I am making poor progress in Estonian.
- ☐ I don't know what s/he thinks.

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Parent Questionnaire

Dear parents of late immersion students,

The Immersion Centre wishes to obtain feedback from parents of children who are enrolled in the immersion programme. Your feedback is an important source of information for the Ministry of Education and Research (MER), for the Immersion Centre and for the immersion schools. This research project is financed by the MER and the study is commissioned by the Immersion Centre. Research data and their analysis will support all three aforementioned institutional levels in working together.

This research project includes all four schools that began offering late immersion programming in 2003. In addition to parents, school managers, teachers and students will be surveyed. Lesson observations will be conducted.

The primary focus of the research is to determine those factors that contribute to successful and sustainable programme implementation. It is also hoped that the research can support school administrators and teachers in helping students to improve their achievement.

Should you have more than one child in the programme, please fill out a separate questionnaire for each child.

In a few weeks Grade eight and nine immersion students will be asked to answer a questionnaire about their participation in the programme. Above all, the questionnaire seeks to determine students' programme-related learning preferences, attitudes and thoughts. As is the case with you, students' participation in the survey is strictly voluntary. The student questionnaire has been approved by the Estonian Association of Immersion Parents.

Your child's and your anonymity are ensured. Data will only be processed by the researchers. No information will be divulged about individual responses. Data from all parents will be grouped by school and together with that obtained from the other three schools in order to make recommendations which will be shared with research participants and the Immersion Centre and the Ministry of Education and Research.

Should you have any questions please feel free to approach the Immersion Centre (605-7250) or me directly.

Thank you for returning the completed questionnaire!

Peeter Mehisto
PhD student
Institute of Education
University of London
peeter.mehisto@gmail.com

Child Information

Name of School: _____

Grade: _____

Sex: _____

How many children do you have attending the early immersion programme?

How many children do you have attending the late immersion programme?

Questionnaire

1. Overall, how satisfied are you with the immersion programme this academic year?

☐ Very Satisfied ☐ Somewhat Satisfied ☐ Somewhat Dissatisfied ☐ Very Dissatisfied.

2. Why is your child in the immersion programme? Please rate (using an x) the importance of each of the following possible reasons.

Reason		very important	important	not important
a	The child will develop Estonian language proficiently			
b	The child will develop Russian language proficiency.			
c	The immersion school is close to home.			
d	My child's friends are in this class.			
e	The school provides a good education.			
i	other (Please specify!)			

3. How frequently do you get information about the programme through the following means:

Means		very often (on average at least twice a month)	often (on average at least once a month)	occasionally	never
a	by attending general meetings for all parents at the school				
b	by attending meetings for all parents of immersion students				
c	by attending meetings for parents of my child's class				
d	through information letters, bulletins or school newspaper				
e	through emails				
f	through the school's home page				
g	by speaking with teachers and/or Grade coordinator during her/his office hours				
h	by speaking with the headteacher or deputy headteacher during their office hours				
i	by reading messages in my child's agenda book				
j	by attending parent-student-teacher conferences				
k	by teacher visits to our home				
l	other (Please specify!)				

4. Which aspects of the immersion programme would you like more information about? Check all that apply.

- ☐ teaching/learning methodologies
- ☐ how my child will be evaluated
- ☐ research on immersion programmes
- ☐ research on multilingualism
- ☐ plans for Grades 10-12
- ☐ how I can better support my child
- ☐ what extra-curricular activities are planned
- ☐ teachers qualifications
- ☐ how teachers are supervised
- ☐ the Association of Immersion Parents
- ☐ how immersion schools co-operate with one another
- ☐ learning a third language
- ☐ how the school is helping your children meet Estonian speakers
- ☐ other (*please specify*)

5. To what extent do you agree or disagree with each of the following statements:

Statements		Strongly Agree	Somewhat Agree	Somewhat Disagree	Disagree
a	I feel well-informed about the immersion programme.				
b	The deputy headteacher is open to dialogue with parents including about discussing problems.				
c	The headteacher is open to dialogue with parents including about discussing problems.				
d	The Grade coordinator is open to dialogue with parents including about discussing problems.				
e	The teachers are open to dialogue with parents including about discussing problems.				
f	I am sufficiently informed about my child's progress at school.				
g	My child's Grade coordinator keeps me informed about my child's progress.				
h	The school takes into account parental opinions, suggestions and concerns.				
i	I feel I am welcome in the school.				
j	The school provides adequate support when my child needs help.				
k	I know whom to call when I need information about the immersion programme.				
l	The school's extra-curricular activities support the achievement of immersion programme goals.				
m	Would you like to make any further comments?	<div style="border: 1px solid black; height: 100px; width: 100%;"></div>			

6. To what extent are you satisfied with your child's achievement in the following subjects?

	Subject	language of instruction	very satisfied	somewhat satisfied	somewhat dissatisfied	dissatisfied
a	Mathematics					
b	Science					
c	History					
d	Russian					
e	Estonian					

f	English					
g	Geography					

7. To what extent are you satisfied with your child's achievement in Estonian?

Skill Area	Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Dissatisfied
speaking				
writing				
comprehension of the spoken word				
reading				

8. To what extent are you satisfied with your child's achievement in Russian?

Skill Area	Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Dissatisfied
speaking				
writing				
comprehension of the spoken word				
reading				

9. In your opinion, what does your child feel about studying in Estonian?

☐ Likes it a lot. ☐ Likes it somewhat ☐ Dislikes it somewhat. ☐ Doesn't like it at all.

10. Have you noticed that your child is excessively stressed or tired by school?

☐ no ☐ sometimes ☐ often ☐ regularly

11. What worries you the most about the immersion programme?

12. What are you most pleased about regarding the immersion programme?

13. Where do you envisage that your child will continue his or her studies after basic compulsory school?

- ☐ the same school ☐ another Russian-language school ☐ an Estonian-language school

14. What do you envisage your child doing after graduating from highschool or vocational school?

- ☐ continuing studies in an Estonian language institution
☐ continuing studies in a Russian-language institution
☐ finding a job

15. What country do you see your child living in after he or she completes school or university?

- ☐ Estonia
☐ other (please specify) _____

16. Is there anything else you would like to mention about the immersion programme that has not been asked in this questionnaire?

- ☐ No ☐ Yes (If you answered yes, please specify. If necessary, continue your response on the back of the questionnaire.)

Teacher Questionnaire

Dear immersion teacher,

The Immersion Centre wishes to obtain feedback from teachers.

Your feedback is an important source of information for the Ministry of Education and Research, for the Immersion Centre and for the immersion schools. This research project is financed by the Ministry of Education and Research and the study is commissioned by the Immersion Centre. Research data and their analysis will support all three aforementioned institutional levels in working together.

This research project includes all four schools that began offering late immersion programming in 2003. In addition to teachers, this study will also survey school managers, parents, and Grade eight and nine students.

The primary focus of the research is to determine those factors that contribute to successful and sustainable programme implementation. It is also hoped that the research will support you in helping students to improve their achievement.

Your participation is strictly voluntary. Anonymity is ensured for all participants. Your individual responses will only be processed by the researchers. Based on the research results, recommendations will be made which will be shared with research participants, the Immersion Centre and the Ministry of Education and Research.

Thank you in advance for completing and returning the questionnaire!

Peeter Mehisto
PhD student
Institute of Education
University of London
peeter.mehisto@gmail.com

Background information

Name of School: _____

How many years of experience do you have teaching in general?

1-2 3-5 6-10 11-15 16 or more

How many years of experience do you have teaching in immersion?

1-2 3-5 6-10 11-15 16 or more

How many hours of immersion-related training did you received prior to 1 September 2007?

How many hours of immersion-related training did you received after 1 September 2007?

a) all together

b) percentage of that training that was provided by your school

Please indicate the language(s) through which you taught your subject(s) during the previous academic year.

- ☐ Estonian
- ☐ Russian
- ☐ Russian and Estonian

Please indicate the language(s) in which you are teaching you subject(s) this academic year.

- ☐ Estonian
- ☐ Russian
- ☐ Russian and Estonian

Please indicate the extent to which you taught immersion student through Estonian?

100%, 95%, 90%, 85%, 80%, ...

Please indicate your place of employment and the position you held immediately prior to becoming an immersion teacher. *(Please check at least one.)*

- ☐ standard programme teacher (teaching in Russian) at same school
- ☐ standard programme teacher Estonian teacher at same school
- ☐ standard programme teacher (teaching in Russian) at another school
- ☐ standard programme teacher (teaching in Estonian) at another school

- ☐ immersion teacher at another school
☐ university student
☐ other (Please specify.) _____

What is your first (strongest) language? Please check one.

- ☐ Estonian
☐ Russian
☐ Other (Please specify.) _____

Questionnaire

1. How did you learn that the school was looking to hire an immersion teacher?

- ☐ through a newspaper advertisement
☐ through acquaintances
☐ recruited by my school management
☐ other (Please specify.) _____

2. Overall, how satisfied are you with your decision to teach in the immersion programme? (Please use an 'X' to indicate the answer that most suits you.)

- ☐ Very Satisfied ☐ Somewhat Satisfied ☐ Somewhat Dissatisfied ☐ Very Dissatisfied

3. What have you done personally to improve your knowledge of immersion methodology? (Please check all those that apply.)

- ☐ have attended or am attending workshops or training
☐ read Immersion Centre website or other Internet-based materials
☐ read immersion-related literature in Estonian
☐ read immersion-related literature in Russian
☐ read immersion-related literature in English or other foreign languages
☐ have taken or am taking a university course
☐ take part in a network with other teachers which has led to the sharing of teaching experience
☐ other (Please specify.) _____

4. How frequently do you use each of the following to provide information to parents about the programme?

Means		often	occasionally	never
a	general meetings for all parents at the school			
b	meetings for parents of all immersion students			
c	meetings for parents of my students			
d	school newsletters, bulletins or school newspaper			

e	e-mail			
f	school home page			
g	my office hours			
h	headteacher or deputy headteacher office hours (with you in attendance)			
i	messages in the students' agenda books			
j	student-parent-teacher conferences			
k	home visits			
l	Association of Immersion Parents newspaper			
m	Other (Please specify.)			

5. To what extent do you agree or disagree with each of the following statements:

Statements		Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree
a	The deputy headteacher supports me in my work.				
b	I can raise work-related concerns with the deputy headteacher.				
c	I raise work-related concerns with the headteacher.				
d	I feel safe raising work-related concerns with the headteacher.				
e	I feel valued as a teacher by the deputy headteacher.				
f	I feel valued as a teacher by the headteacher.				
g	My immersion colleagues support me.				
h	Standard programme teachers support me.				
i	My immersion colleagues support me.				
j	I am adequately prepared to work in immersion. (sufficient training)				
k	My students' parents respect me.				
l	My students like me.				
m	Out school's immersion teachers constitute a good team.				
n	I have a say in how the immersion programme is developed.				
o	I am happy to come to school every morning.				
p	Would you like to make any further comments? (Please specify.)				

6. In your opinion, how students in each of your classes should not be in the immersion programme?
Please fill in the chart below:

Class	Number of girls who should not be in class	Number of boys who should not be in class	Why should these students not be in immersion?

7. How often do the following take place in during your lessons:

Statements		almost every day	frequently (more than twice a week)	sometimes (less than twice a week)	never
a	I speak Estonian in class.				
b	I speak Russian in class.				
c	Students do pair work.				
d	Students do group work.				
e	I repackage learning material into smaller more easily understood chunks.				
f	I organise some form of evaluation (including self-evaluation).				
g	I use different strategies for teaching boys and girls.				
h	I share and/or agree on learning outcomes with students.				
i	I set language goals (outcomes) for my students.				
j	I set content goals (outcomes) for my students.				
k	My students and I analyse the learning process.				
l	I work together with other teachers to create projects that integrate two or more subjects.				
m	I organise extra-curricular activities.				
n	My students use Estonian-language newspapers, home pages, blogs, TV or radio broadcasts and public language environments for learning.				

o	I survey student interests and take these into account.				
p	My students do experiments.				

8. Who are more difficult to teach – boys or girls?
(Choose one and explain you choice. Please explain your choice.)

☐ Boys ☐ Girls ☐ Both are equally difficult

9. Who causes you more problems – boys or girls?
(Choose one and explain you choice. Please explain your choice.)

☐ Boys ☐ Girls ☐ Both are equally difficult

10. How many Estonian-speaking guests have you brought into your classroom within the last 40 teaching days?
(Please circle one.)

0 1-2 3-5 6-10 more than 11

11. How many times were you observed teaching during the past two years?

Observed by		2006/2007	this academic year
a	Headteacher		
b	Deputy headteacher		
c	Other teachers		
d	Parents		
e	Inspectors		
f	Immersion Centre staff		
g	Others (Please sepcify.)		

12. Please rate the usefulness of the feedback that you received and / or of the dialogue that took place after you were observed teaching. (If a particular category of persons did not observe any of your lessons, please leave the line blank. Use an 'X' to indicate the degree(s) of usefulness.)

Feedback received from/ dialogue with		academic year 2006/2007				this academic year			
		very useful	some- what useful	of little use	com- pletely useless	very useful	some- what useful	of little use	com- pletely useless
a	Headteacher								
b	Deputy headteacher								
c	Other teachers								
d	Parents								
e	Inspectors								
f	Immersion Centre staff								
g	Other (Please specify.)								

13. Please rate the extent to which each of the following motivates you to work in the immersion programme.

Factors		Highly motivating	Somewhat motivating	Not at all motivating
a	Salary			
b	Recognition by other teachers (recognition = acknowledgement of ability, achievement and contributions, or expressions of appreciation)			
c	Recognition by deputy headteacher			
d	Recognition by headteacher			
e	Recognition by parents			
f	Recognition by students			
g	Recognition by Immersion Centre and its staff			
h	Fear (Please specify.)			
i	High levels of student achievement			
j	Opportunities for teamwork			
k	Training			

l	New challenges			
m	New responsibilities			
n	Other (Please specify.)			
o	Other (please specify)			

14. Do you wish to continue to work in the immersion programme next year?

☐ Yes

☐ No

15. Whom do you see yourself working as in five years?
(Please use an 'X' to mark up to two boxes.)

☐ as a teacher

☐ as a teacher trainer

☐ as a deputy headteacher

☐ as a headteacher

☐ in a job outside of the education sphere

☐ other (Please specify.) _____

16. Please rate the extent to which the following factors have contributed to the success of the immersion programme in your school:

Factors		Greatly	Significantly	Somewhat	Not at all
a	Teacher in-service training				
b	Teaching materials created under the management of the Immersion Centre				
c	Financial support provided through the school budget				
d	Moral support provided by school management				
e	Programme management by the Immersion Centre				
f	Programme management by school managers				
g	Your school's in-house research				
h	Independent research into student achievement				
i	Support from the Immersion Centre				

j	Co-operation with parents				
k	The children's hard work				
l	Local government support				
m	Ministry of Education and Research support				
n	Other (Please specify.)				
o	Other (Please specify.)				

17. What would you say are your two greatest strengths as an immersion teacher?

18. Name up to three (3) of your school's greatest strengths.

19. What in your opinion would the following stakeholders in education identify as your immersion programme's greatest strength?

Stakeholder		Strengths
a	Local government	
b	Parents	
c	Headteacher	
d	Deputy headteacher	
e	Students	

20. Name up to 3 of your school's weaknesses.

21. What in your opinion would the following stakeholders identify as your school's weaknesses?

Stakeholder		Criticisms
a	Local government	
b	Parents	
c	Headteacher	
d	Deputy headteacher	
e	Students	

22. Does your job description differ from that of someone teaching in the standard programme? (If yes, please specify how.)

☐ YES ☐ NO ☐ I DON'T KNOW

23. What was the most frequent problem that you faced during your first year of teaching in the immersion programme?

24. What in your work drains you emotionally?

25. What gives you energy in your work?

26. What concerns do parents generally have vis-à-vis the immersion programme?

27. Is there anything else you would like to mention about the immersion programme that has not been asked in this questionnaire? (If yes, please specify. If need be, please use the back of the questionnaire.)

☐ YES ☐ NO

Headteacher and Deputy Headteacher Questionnaire (*de facto* interview schedule)

Dear school manager,

The Immersion Centre wishes to obtain feedback from school managers. Your feedback is an important source of information for the Ministry of Education and Research, for the Immersion Centre and for the immersion schools. This research project is financed by the Ministry of Education and Research and the study is commissioned by the Immersion Centre. Research data and their analysis will support all three aforementioned institutional levels in working together.

This research project includes all four schools that began offering late immersion programming in 2003. In addition to school managers, this study will survey teachers, parents, and Grade eight and nine students. Lesson observations will be conducted.

The primary focus of the research is to determine those factors that contribute to successful and sustainable programme implementation. It is also hoped that the research can support you in helping students to improve their achievement.

Your participation is strictly voluntary. Anonymity is ensured for all participants! Your individual responses will only be processed by the researchers. Data from all school manager interviews will be grouped together. This will act as a basis for recommendations shared with research participants, the Immersion Centre and the Ministry of Education and Research.

Thank you in advance for completing the questionnaire!

Peeter Mehisto
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Institute of Education
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Background information

1. Name of School: _____

2. Number of years experience as headteacher or as a deputy headteacher.

1-2 3-5 6-10 11-15 16 or more

3. Number of years as a headteacher or as a deputy headteacher of an immersion school.

1-2 3-5 6-10 11-15 16 or more

4. Area of specialisation and institution of higher learning from which you graduated.

5. Number of hours of immersion-related training you received prior to 1 September 2007.

6. Number of hours of immersion-related training you received after 1 September 2007. (What percentage of this was organised by your own school?)

7. Are you teaching any immersion/non-immersion classes this year? Which subjects.

8. Overall, how satisfied are you with the fact that your school is participating in the immersion programme?

Satisfied

Somewhat satisfied

Somewhat Dissatisfied

Dissatisfied

9. How frequently and in which way does your school use each of the following to provide information to parents about the immersion programme?

Means		often (on average 2 x a month)	Often (at least once a month)	occasionally	never
a	general meetings for all parents at the school				
b	meetings for all parents of immersion students				
c	teacher-organised meetings (one class at a time)				
d	school newsletters, bulletins, school newspaper				
e	e-mail				
f	school's home page				
g	teachers' office hours				
h	headteacher's or deputy headteacher's office hours				
i	messages in student's agenda book				
j	parent-student-teacher conferences				
k	home visits				
l	other (Please specify!)				

10. To what extent do you agree or disagree with each of the following statements:

Statements		Strongly Agree	Somewhat Agree	Somewhat Disagree	Disagree
a	I feel comfortable raising concerns with the deputy headteacher/headteacher.				
b	I feel teachers can come to me with a problem.				
c	I feel comfortable raising work-related concerns with the teachers.				
d	I do my best to make certain teachers feel valued.				
e	I feel supported by colleagues in other immersion schools.				
f	I feel adequately trained to manage a school with an immersion programme.				
g	My staff respect me.				
h	My staff like me.				
i	Students like me.				
j	The immersion teachers in our school constitute a good team.				
k	Our teachers have a say in how the immersion programme is developed.				
l	I am happy to come to school every morning.				
m	Would you like to make any further comments? (Please specify.)				

11. In your opinion, how many Grade 8 and Grade 9 students should not be in the immersion programme?

Grade	Number of girls who should not be in prog.	Number of boys who should not be in prog.	Why should these students not be in immersion?
8			
9			

12. Rate the extent to which you agree or disagree with each of the following statements about the classroom practice of immersion teachers:

Statements		almost every day	frequently	sometimes	never
a	Teachers speak Estonian in class.				
b	Teachers speak Russian in class.				
c	Students do pair work.				
d	Students do group work.				
e	Teachers repackage material into smaller, more easily understood chunks.				
f	Teachers organise some form of evaluation (including self-evaluation).				
g	Teachers use different strategies for teaching boys and girls.				
h	Teachers share and/or agree on learning outcomes with students.				
i	Teachers set language goals (outcomes) for students.				
j	Teachers set content goals (outcomes) for students.				
k	Teachers and students analyse the learning process.				
l	Several teachers work together to create projects that integrate two or more subjects.				
m	Teachers organise extra-curricular activities.				
n	Students use Estonian-language newspapers, home pages, blogs, TV or radio broadcasts or public environments for teacher-organised learning.				
o	Teachers survey student interests and wishes and take these into account.				
p	Students do experiments.				
q	I speak Estonian with immersion students in immersion classes.				
r	I speak Estonian with immersion students outside of immersion classes.				

13. Who are more difficult to teach – boys or girls? Please explain your choice.

14. Who causes you more problems – boys or girls? Please explain why?

15. How many times have you or other stakeholders observed immersion classes during the last two school years?

Observed by		2006/2007	this academic year
a	Headteacher		
b	Deputy headteacher		
c	Other teachers		
d	Parents		
e	Inspectors		
f	Immersion Centre staff		
g	Others (Please sepcify.)		

16. Please rate the usefulness of the feedback received or the dialogue that took place after observed classes from two perspectives – first, the perspective of the teacher's professional development, second from the perspective of your professional development. What did you learn?

Observer		Usefulness for teacher's professional development				Usefulness for your own professional development			
		very useful	some-what useful	of little use	com-pletely useless	very useful	some-what useful	of little use	com-pletely useless
a	Headteacher								
b	Deputy headteacher								
c	Other teachers								
d	Parents								
e	Inspectors								
f	Immersion Centre staff								
g	Other (Please specify.)								
								

17. To what extent have the following motivated your teachers to work in immersion or you to work as the manager of the programme?

Factors		Highly motivating		Somewhat motivating		Not in the least motivating	
		Teachers	You	Teachers	You	Teachers	You
a	Salary						
b	Recognition by other teachers (recognition = acknowledgement of ability, achievement and contributions, or expressions of appreciation)						
c	Recognition by deputy headteacher						
d	Recognition by the headteacher						
e	Recognition by parents						
f	Recognition by students						
g	Recognition by Immersion Centre and its staff						
h	Fear (Please specify.)						
i	High levels of student achievement						
j	Teamwork opportunities						
k	Training						
l	New challenges						
m	New responsibilities						
n	Other (Please specify.)						
o	Other (Please specify.)						

18. Do you feel that you provide your immersion programme teachers with sufficient recognition?

Too little

Sufficiently

Too much

19. Do you receive sufficient recognition for your work in managing the immersion programme?

Too little

Sufficiently

Too much

23. What would you say are your two greatest strengths as an immersion programme manager?

1.

2.

24. Name three (3) of your school's strengths.

1.

2.

3.

25. In your opinion, what would the following immersion programme partners identify as your programme's greatest strength?

	Partner	Strengths
a	Local government	
b	Parents	
c	Headteacher / deputy headteacher	
e	Students	
f	Ministry of Education and Research (School Network Bureau)	

26. Name up to 3 of your school's weaknesses.

1.

2.

3.

27. In your opinion, what would your following partners consider to be your immersion programme's weaknesses?

Partner		Reported weaknesses
a	Local government	
b	Parents	
c	Headteacher / deputy headteacher	
d	Students	
e	Ministry of Education and Education (School Network Bureau)	

28. Does your job description differ from that of someone working in a non-immersion school?

☐ Yes ☐ No

If yes, in what way does it differ? (What, if any, are the specific references to immersion in your job description?)

29. What was the most frequent problem that you faced during your first year as headteacher / deputy headteacher of an immersion school?

30. From a work-related perspective, what drains you emotionally?

31. From a work-related perspective, what gives you energy?

32. What concerns do parents generally have vis-à-vis the immersion programme?

33. Is there anything else you would like to mention about the immersion programme that has not been asked during this interview?

(If you answered yes, please specify.)

Core questions for decision-makers

Millal esmakordselt kuulsid/kuulsite keelekümblysest?	When did you first hear about immersion?
Milline oli Su/Teie esialgne hoiak ja kas see esialgne hoiak keelekümblysesse on muutunud? Mis aitas meelt muuta?	What was your initial stance vis-à-vis immersion and has this changed? If yes, what helped change your mind?
Mis veenis Sind keelekümblyse tõhususes? Miks Sa otsustasid toetada keelekümblysprogrammi? Mida see annab riigile?	What convinced you that immersion is effective? Why did you decide to support the programme? What does it give the country?
Mis oli Sinu/Teie panus sellesse programmi?	What was your contribution to building the programme?
Kas pead/peate keelekümblysprogrammi edukaks? Kui jah, siis mis on aidanud tagada programmi edukat toimimist?	Do you consider the immersion programme to be a success? If yes, which investments have helped ensure successful programme implementation?
Milliste probleemidega puutusid/puutusite Sa/Te kokku programmi rakendamise käigus ja kuidas need lahendati?	What problems did you face in reference to programme implementation and how were those solved?
Millisena kujutad/kujutate ette keelekümblyse tulevikku Eestis?	What is your vision of the future of immersion in Estonia?